

Monday, January 20, 1986

Advertising Age

Crain's International Newspaper of Marketing

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SUPER BOWL MARKETING

The growth of America's premier sports event

Cost of :60 spot

I—1967 \$80,000	VI—1972 \$200,000	XI—1977 \$324,000	XVI—1982 \$670,000
II—1968 \$70,000	VII—1973 \$207,000	XII—1978 \$290,000	XVII—1983 \$800,000
III—1969 \$85,000	VIII—1974 \$214,000	XIII—1979 \$444,000	XVIII—1984 \$890,000
IV—1970 \$200,000	IX—1975 \$220,000	XIV—1980 \$450,000	XIX—1985 \$1,000,000
V—1971 \$200,000	X—1976 \$250,000	XV—1981 \$550,000	XX—1986 \$1,100,000

The tumult ends for D'Arcy's Hal Bay

— Page 1

SAMI-Burke combo to challenge Nielsen

— Page 1

It's Herb! Super Bowl debut, tour set by BK

— Page 1

Brewers rolling out barrel in share fight

— Page 4

*****5-DIGIT 20014
CONGL AA 860399 99 GRA
CONGRESSIONAL INFO SERVICE
SRI ACQUISITIONS
4520 EAST-WEST HWY #800
WASHINGTON DC 20014

HIGHLIGHTS

Nielsen gets challenge 1

The battle for dominance in marketing research intensifies as the research subsidiaries of Time Inc. and Control Data Corp. merge their resources to challenge the A.C. Nielsen Co. unit of Dun & Bradstreet.

Bay's rise was rocky 1

Hal Bay, who has resigned as president of D'Arcy Masius Benton & Bowles, came to power as a compromise, the only viable candidate in a bitter battle between two agencies—D'Arcy-MacManus International and Masius, Wynne-Williams—that had merged more in name than in spirit. *First of a series.*

Creation of a media monster 3

When it comes to advertising, it is the mind-boggling \$1.1 million minute for Super Bowl XX that people talk about. It's become as much of a phenomenon as the game itself—the most expensive minute in tv advertising. But how did the Super Bowl become such a big event? The men who created the game will tell you the Super Bowl just kind of happened.

Here comes Hyundai 3

Hyundai Motor America this month drives into the U.S. with a three-week teaser campaign designed to introduce both the South Korean company and its first car designed for the U.S.

Sweet inspiration 27

The sugar industry will sweeten its advertising pot this year, adding \$1 million to its ad budget and using tv spots for the first time. Also being considered is a sugar "designer label" for food-product marketers that use the real thing.

In the swim 33

Ujena Co. hopes to broaden awareness of its mail-order swimsuits with *Swimwear Illustrated*, wrapping a slick editorial format around the company's catalog. Buoyed by the success of *Sports Illustrated's* annual swimsuit issue, Ujena sees *Swimwear*, which features only Ujena swimwear, both as a means of increasing sales and a potential winner at newsstands.

Income

Salary . . . \$30,000

Needs

To limit tax liability

To build investments

Reality theater 42

John Hancock Financial Services' new "Real life, real answers" campaign by Hill, Holliday, Connors, Cosmopolis, Boston, most definitely breaks through

the clutter. In fact, it just about grabs you by the neck and shakes you: "Real life, real answers, DAMN IT!" A review by Bob Garfield.

Taking chances 66

Bozell, Jacobs, Kenyon & Eckhardt's resignation of the \$10 million-to-\$12 million Prudential-Bache account in order to compete for \$40 million in Merrill Lynch business (AA, Jan. 9) is the best illustration to date of why Bozell & Jacobs decided to merge with Kenyon & Eckhardt—a greater capacity to take risks.

Triangle whips up 'Good Food' 67

Triangle Communications' top executives remain optimistic about this week's reintroduction of *Good Food*, despite an unenthusiastic response so far from advertisers. Said group publisher Frank Wolf, Walter Annenberg, chairman, parent Triangle Publications, "tells me, and tells everyone, he doesn't expect to fail. And given the adequate amount of time, I don't see how we can."

Auto media spending on rise 69

Heightened competition in the U.S. car and truck market is likely to drive total new-vehicle media spending to \$6 billion this year, a top auto executive predicts.

CORPORATE CLOSEUP

Thompson's on the spot 4

Thompson Medical Co., the company that makes its money by helping thousands of Americans lose weight, was forced onto a corporate diet itself last year. Competition heated up in Thompson's biggest category, appetite suppressants, and the bottom fell out of its second-largest, meal replacements.

NEW PRODUCTS

Innovations, yes; technology, no 35

While marketers are coming up with record numbers of new food and beverage products, the innovations are coming in areas they know best—positioning and formula—rather than from any new technology.

INTERNATIONAL

Hugo's hot 40

Meet Hugo Sanchez, a Mexican soccer star who endorses more products than the Chicago Bears' William (The Refrigerator) Perry.

Chinese ad crackdown 40

The Chinese government is taking steps to regulate the advertising industry, which has grown substantially since major reforms were introduced in 1979 that opened the door for western-style marketing.

Little dabs still do it 41

Beecham Products' Brylcreem is making a comeback in the U.K. with an ad campaign via Grey Ltd., London, that uses segments of old, b&w U.S. spots.

OTHER NEWS

After a year of new-product rollouts, new national advertising campaigns and repositionings, the nation's brewers are down to arm wrestling for increased market share. Page 4.

Cruise-ship operators and many warm-weather destinations on this side of the Atlantic are expecting their best year ever, as travelers appear to be taking a detour from terrorism. Page 32.

New American Dental Assn. standards of what constitutes a genuine plaque-fighting dental product will keep the group's coveted Seal of Acceptance from most toothpastes and mouth rinses. But major dentifrice producers are giving the criteria the brushoff, and will continue current antiplaque advertising campaigns. Page 36.

The market setting is the West Coast, but the style will be more "Miami Vice" when General Motors' Pontiac division on Jan. 20 launches a three-month, \$4.5 million California-only media effort. Page 42.

John Pepper, newly appointed president of Procter & Gamble, worked his way up through the advertising side of the company, a factor P&G watchers say clearly shows the direction the company is heading. The marketer last week formally announced Mr. Pepper's move from exec vp-U.S. consumer products to the presidency. Page 64.

Drug companies, broadcasters and agencies may face congressional hearings if interest in direct-to-consumer prescription-drug advertising continues to grow. Page 67.

Nissan Motor Corp. may enter the fast-growing luxury sedan market within 24 months, but probably won't form a new marketing division as Japanese rival Honda is doing with Acura. Page 69.

Although negotiations between Estee Lauder and Giorgio for Lauder's purchase of the \$110 million fragrance company broke off last week, it's clear Lauder is no longer content with being a one-star company. Page 71.

COMING THURSDAY

Philip Guarascio holds a coveted corner office in Detroit's General Motors building, a privilege usually reserved for people who have made automobiles and GM their lives. Guarascio is an outsider, recruited from the agency business to become executive director for advertising services on GM's marketing and product planning staff. He oversees GM's \$1 billion a year ad and promotional budget from a position that didn't exist before he filled it.

Special Report: Niche, product development and target audience are all part of the vocabulary of newspaper executives as marketing becomes an important part of the business.

Shasta shakeup has it fizzling

By BRIAN LOWRY

HAYWARD, CAL.—Shasta Beverages appears to be in disarray following its acquisition by National Beverage Corp. from Sara Lee Corp.

The eight-person marketing staff has left the soft-drink company during the last two months, and members of the executive committee and sales force seem likely to follow, a former Shasta executive predicted.

Notable among those leaving is director of marketing Rob Cohen, who took the title of vp-marketing at Blue Cross of California, Woodland Hills (AA, Jan. 16). Shasta sales manager Truitt Crenshaw is overseeing marketing on an interim basis.

The exodus reflects Shasta's uncertainty. (Continued on Page 68)

Xerox 15s to run in serial form

By BRIAN MORAN

Xerox Corp. next month will break an unusual series of 15-second commercials telling a continuing story about the Xerox Marathon copier throughout an hour of network tv programming.

To convince business customers that its copier won't break down in a pinch, Xerox agency Needham Harper Worldwide, New York, has created a "serial" that shows how "boring" owning a Marathon can be.

The spots feature a satisfied Marathon user trying to get excited about a machine that "just keeps churning 'em out."

Xerox has bought up to six units each on CBS-TV's broad- (Continued on Page 68)

West Coast news

Star-Kist pet food to GB&Y

Star-Kist Foods hired Goodby, Berlin & Silverstein, San Francisco, to handle an undisclosed new pet food product, beating out Keye/Donna/Pearlstein and Chiat/Day, both Los Angeles, in a review. As part of its winning pitch to the H.J. Heinz Co. unit, the three agency principals donned manson dog suits to help convince the H.J. Heinz Co. subsidiary of their interest. Star-Kist, a division of H.J. Heinz Co., declined to discuss the product, but sources (Continued on Page 70)

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After teasers, Hyundai set to 'make sense'

By CLEVELAND HORTON

GARDEN GROVE, CAL.—Hyundai Motor America later this month drives into the U.S. market with a three-week teaser campaign designed to introduce both the company and its first car designed for the U.S.

The teaser-corporate campaign is designed to pique the interest of the car-buying public before the Excel goes on sale Feb. 15.

The new U.S. importer is a subsidiary of the giant South Korean conglomerate Hyundai Corp., and the campaign will focus on the company's heritage, specifically its ranking in the ship-building and locomotive manufacturing industries.

The ads point out that Hyundai Corp., with annual sales of about \$11 billion, is the 39th-largest corporation in the world.

Print ads, accompanying the company's current participation in the national auto show circuit, use

the headline: "Its father was a locomotive. Its mother was a ship." The first advertising also will stress Hyundai's success in Canada, where the company became the leading automotive importer after only two years.

Not the least of Hyundai's problems is its name, which to westerners can look impossible to pronounce. It will try to make that task easier on the western world with an explanation in copy that Hyundai rhymes with Sunday.

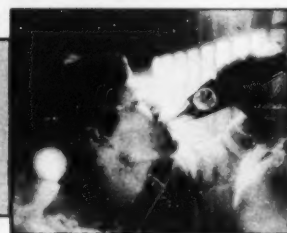
The first tv commercials keep the Excel under wraps. They show the cars loaded on a carrier truck, each carefully cloaked in what appears to be a tarpaulin.

As the kickoff date approaches, Hyundai will remove the covers from the car. Once the car begins selling, Hyundai will substitute more traditional product advertising while retaining the theme line "Hyundai. Cars that make sense."

Hyundai is aiming its message at
(Continued on Page 69)



Royal Crown Co. takes viewers inside a prison in this Super Bowl spot, new from Dancer Fitzgerald Sample, New York. RC is



the only soft-drink advertiser with network time during the game. For an armchair guide to Super Bowl ad-watching, see Page 70.

The Super Bowl: Two decades in the spotlight

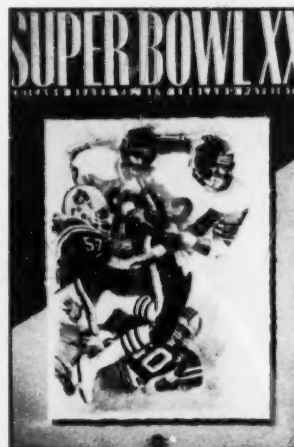
By ROBERT RAISSMAN

Vince Lombardi paced the sidelines, champing at the bit.

His Green Bay Packers were on the way to defeating the Kansas City Chiefs in Super Bowl I, erasing any doubt about whether the National Football League was superior to the American Football League.

The second-half kickoff was drilled deep into Kansas City territory. Referees' whistles started blowing. There was confusion—no penalty flags had been thrown, but the zebras were bringing the ball back. Mr. Lombardi was doing his version of the Ubangi stomp on the sidelines.

Only Bill Creasy, a CBS producer handling the pool feed for both CBS and NBC, knew what was happening. A Winston cigarette commercial running on NBC had delayed the start of the kickoff. With 13 seconds left in the commercial, the officials decided to start the second half. NBC cut from the spot and picked up the action. Tv viewers saw the ball hitting the ground and the referees whistling it dead. When the refs began running the ball back, viewers were told the kickoff was being repeated because the game clock had not started and Mr. Lombardi's Packers had jumped the gun.



Circle Fine Art, Chicago, last week rushed this NFL-licensed poster to market.

Bill McPhail, CBS vp in charge of sports, said both NBC and CBS had been warned to cut first-half replays short and to get into the commercial fast.

NBC engineers missed the cue on that day 20 years ago, writing the first chapter of the Super Bowl advertising phenomenon.

When it comes to advertising, it is the mind-boggling \$1.1 million minute for Super Bowl XX

that people talk about. It's become as much of a phenomenon as the game itself—the most expensive minute in tv advertising.

But how did the Super Bowl become such a big event? Was there a concerted marketing effort behind it? The men who created the game say no.

They will tell you the Super Bowl just kind of happened.

"We sold the television rights to the 1960-61 NFL Championship Game to CBS for \$600,000," said NFL commissioner Pete Rozelle. "That was before the merger [between the AFL and NFL]. I thought it was a lot of money, but I could never foresee advertisers ever paying a million for a minute."

In 1969, Super Bowl III set the price for future advertisers. The New York Jets, the AFL underdogs led by brash Joe Willie Namath, defeated the heavily favored Baltimore Colts, 16-7. The price of a minute skyrocketed from \$85,000 to \$200,000 for Super Bowl IV the next year.

Not only was there a lot at stake for the Jets, there was also a lot riding on the game for NBC, the network that telecast AFL games. In 1965, NBC had bailed out the AFL by paying \$36 million for tv rights. The network stipulated that much of the

(Continued on Page 71)

World News Roundup

SAO PAULO—Ford Motor Co. executives in Argentina, Brazil and Venezuela will hear a Young & Rubicam "marketing and product strategy" presentation here this week. Similar presentations have been made to Ford in other parts of the world. A Ford spokesman says there "are no plans to change agencies in Brazil." J. Walter Thompson Co. and Salles/InterAmericana handle the account in Brazil.

FRANKFURT—American Express Co. moved its \$10 million credit-card advertising account to Ogilvy & Mather from McCann-Erickson.

PARIS—Parker Pen Co. moved its account in France, Holland, Belgium and Luxembourg to Lowe Marschalk from Ogilvy & Mather.

SYDNEY—Doyle Dane Bernbach is merging its Australian operations with Magnus Nankervis & Curl. MNC will own 51% of the new agency, billing \$60 million, and will supply top management.

BERNE—Nestle, Ciba-Geigy and other top Swiss companies have formed a group to lobby for the creation of a private national tv
(Continued on Page 40)

AD AGE SOUNDING BOARD

Strategy, creative shaping ad budgets

Competition, spending also keys

This is the second of two articles on the ADVERTISING AGE Sounding Board outlook for advertising in 1986. The first article ran Jan. 13.

By HERBERT ZELTNER

Attempting to put the budget-planning process into the perspective of change over time, we asked members of the ADVERTISING AGE Editorial Sounding Board which of a variety of forces and measurements were gaining—and which were losing—in importance in their thinking when advertising budgets were being determined (Table 4).

More than half the client-side executives who responded noted impending changes in advertising strategy, or modifications in creative approach, are taking on increasing importance in their budget thinking. Close to half (47%) also stated that competitive activity and spending levels were becoming more significant. Yet the very practical matter of profit contribution goals or other financial targets—already named as the most important single factor by

more than half the group—is gaining.

More than half the agency respondents (56%) also singled out financial targets and profit contribution as growing in importance in client budget thinking.

Agency executives also believe a greater regard for competitive activity is occurring in budget strategy work and that changes in strategy will take on added significance as well.

On the other hand, a good number of marketing executives sense that adjustments to the previous year's budget level will be decreasing in importance as a factor in budget making. Agency participants broaden the list of factors lessening in significance—25% of them stating that media cost projections and working from last year's spending levels will take on less prominence in client thinking.

Industrywide spending

On the broader subject of national advertising in general, we asked members of our Sounding Board how they personally felt about advertising spending
(Continued on Page 28)

Keys to ad budget size - Table 4

Factors gaining and losing in importance in determining size of advertising budgets percent total respondents. Source: Ad Age Sounding Board.

ADVERTISERS—REFERRING TO OWN COMPANIES

Growing in importance	
Intended changes in advertising strategy and/or creative approach	51%
Competitive activity and/or spending levels	47%
Profit contribution goal or other financial target	43%

Decreasing in importance

Level of previous year's spending, with adjustment	17%
Senior management dollar allocation or set limit	11%
Volume share projections	8%

AGENCIES—REFERRING TO CLIENT COMPANIES

Increasing in importance	
Profit contribution goal or other financial target	56%
Competitive activity and/or spending levels	43%
Intended changes in advertising strategy and/or creative approach	37%

Decreasing in importance

Projections/assumptions on media cost increases	25%
Level of previous year's spending, with adjustment	24%
Modifications in media strategy and/or buying techniques	17%

CORPORATE CLOSEUP

Thompson Medical hungry for new markets

By NANCY GIGES

Thompson Medical Co., the company that makes its money by helping thousands of Americans lose weight, was forced onto a corporate diet itself last year. Competition heated up in Thompson's biggest category, appetite suppressants, and the bottom fell out of its second-largest, meal replacements.

When final figures are calculated, sales for the year ended Nov. 30 may be more than 30% below those of the previous year. Earnings may fall 40%.

But executives at New York-based Thompson point out that '84 was a record year, primarily due to a \$50 million increase in Slim-Fast meal replacement sales. Thompson says it never expected to beat those figures a year later.

"We're a 'seize the moment' kind of company," said Ronnie Stern, vp-marketing. "We don't manage our sales and earnings. We don't hold back new products nor push them ahead to make our income statement look good."

That's why a graph of Thompson sales and earnings zigs and zags, reflecting spurts of growth when the company takes advantage of opportunities. This past year's nose dive, however, was more than

Thompson anticipated, as unit volumes fell in its two key categories.

Sales are estimated at \$140 million for fiscal '85, down from the \$197.2 million reported a year ago. Earnings are estimated at \$12 million, down from \$21.1 million. Analysts say both figures will bounce back this fiscal year, but not quite to the record levels of '84.

True to its philosophy of "seize the moment," Thompson does not spend a lot of time and money on sophisticated market research. It prefers to send its marketing executives out to talk directly to the food and drug trades and, especially, to consumers. The company then puts products in the marketplace and lets the consumer decide.

Typically, Thompson breaks advertising as soon as a product gains

Court limits Thompson, Ciba

New York—Thompson Medical's fight with Ciba-Geigy to hold onto the Dexatrim market share has resulted in a court order preventing both companies from shipping certain products until they provide adequate substantiation.

Ciba-Geigy, Summit, N.J., also has been enjoined from making claims of therapeutic advantage or superiority for Acutrim over Thompson's extra-strength Dexatrim or any other appetite suppressant with phenylpropanolamine.

Both companies claimed victory after the federal court order this month, but neither can ship line extensions that were added to enable them to make longer-lasting claims. The products involved are Thompson's Dexatrim-15, which made a 15-hour claim, and Ciba's Acutrim II, which made a 17-hour claim. Regular Dexatrim makes a 12-hour claim and Acutrim makes a 16-hour claim.

The complicated order prevents Ciba from using comparative advertising for regular Acutrim unless the company presents additional clinical studies that support claims of therapeutic advantage or superiority. Ally & Gargano, New York, handles Acutrim; Saatchi & Saatchi Compton, New York, handles Dexatrim. —N.G.



permanent home with Fairfax Advertising, Saatchi's direct-marketing subsidiary.

Decongest is Thompson's first entry in the huge cough/cold remedy category, and the company's strategy with that product typifies its approach to advertising. Planning to roll out across the country this winter, Thompson gained such good distribution quickly in Chicago, Charlotte, N.C., and Milwaukee that it made spot buys in those markets to precede its network program.

Decongest also represents the first of a hoped-for string of new products that will reduce Thompson's dependence on diet aids, businesses that represented 86% of the company's sales in '84. "Our hope is to enter a new [over-the-counter] category each year," Mr. Stern said. "We want to broaden our base to become a major factor in every [health & beauty aid] category out there."

Those are ambitious objectives, but Mr. Stern points to the company's track record: "When I joined Thompson 10 years ago, we were doing about \$18 million in sales, and only 5% was nondiet aids. Last year sales were near \$200 million."

While the company's first product was not a diet aid, those brands established a firm foundation. Thompson's origins can be traced to 1947 when the current chair-

(Continued on Page 27)

CHILDREN SHOULD BE SEEN AND NOT HEARD

- If you market children's products, you know that children play an important role in the purchase decision-making process.
- If you've tried to measure children's attitudes towards your products and commercials, you know it requires special research expertise to conduct the research and marketing expertise to interpret it.

WE'VE INTERVIEWED OVER 27,000 CHILDREN

- Our unique and innovative attitude measurement technique has been successfully applied to a wide variety of children's product categories with major packaged goods manufacturers.
- Our experienced staff works closely with each of our clients to design research to address their specific marketing needs.
- We deliver accurate, timely, and actionable information with analysis that can add new marketing insights to children's products.

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good distribution. And it spends heavily. Its advertising/sales ratio is more than double the drug-industry average.

For '84, the company reported spending \$52.8 million, a figure equivalent to 27% of sales, compared with an industry average of 11%. Even with sales slumping last year, Thompson did not cut back proportionately; sources estimate ad spending at \$44 million, representing an estimated 31% of sales.

All that money goes through one agency, Saatchi & Saatchi Compton, New York, a shop that convinced Thompson of its worth several years ago by suggesting the company use testimonials for its Dexatrim appetite suppressant.

Accustomed to handling most of its functions in-house, Thompson was experimenting with using outside agencies in 1979 by asking several to come up with concepts. Just

before a new active ingredient for Dexatrim was approved by the Food & Drug Administration, Thompson and one of the agencies produced a spot with the product as hero.

"We all hated it," said Mr. Stern, "but we knew approval would come any day." Then Thompson marketing executives wound up talking to the Compton agency (now part of Saatchi), which told them of the "gold" they had in testimonial letters from consumers. The rest is history.

Thompson is so loyal to Saatchi that even when the agency is blocked from handling a particular product (such as Decongest, because Saatchi handles Johnson & Johnson's Co-Tylenol), it uses another member of the Saatchi family. Decongest, originally handled by Saatchi's healthcare subsidiary, Klemtner Advertising, has found a

Beer marketers barreling toward market-share fight

By SCOTT HUME and RAY SERAFIN

After a year of new-product roll-outs, new national advertising campaigns and competitive repositionings, the nation's brewers are down to arm wrestling for market share.

Total domestic-beer shipments in 1985 increased less than 1%, the fourth consecutive year to yield no significant gain. More importantly, 1985 saw brewers develop product lineups and marketing plans in which flat sales are status quo.

A stagnant or shrinking market is being treated as the new reality of the industry, rather than a short-term problem soon to be reversed, and brewers' 1986 game plans will channel resources toward grabbing larger shares. Analysts expect a rough fight.

"The level of competitive activity is going to be high, but it's going to be more localized," said Manny Goldman, analyst at Montgomery Securities, San Francisco. Brewers have spent the past 18 months polishing or revising their national images to set the stage for a shift in direction this year, he said. "Now I look for the focus to be on particular markets, and submarkets within those markets, to gain

(Continued on Page 66)

Major brewers' output - 1985

Anheuser-Busch and Adolph Coors were the only major brewers that registered gains in barrelage between 1984 and 1985. *Estimated. Figures given in millions of barrels. Source: Montgomery Securities.



Board

(Continued from Page 3)

over-all in 1986 (see Table 5).

The most widely held view on both sides is that budgets will be slowing down in their rate of growth. Just about four out of ten see this braking effect taking hold. Somewhat more than a third believe that 1986 will be up in dollars by a bit, by merely staying even with modest levels of inflation.

Agency executives are much more inclined to a mixed view—that whatever pattern develops will be the result of varying rates of change among different categories. Almost a fifth of the agency officers answering held to this view.

Only 6% of the full panel held to the upbeat view that advertising spending would be up again, sharply, this year.

Many acknowledged that ad spending trends have varied widely from category to category, based on different situations regarding competition, traditional advertising-to-sales ratios, opportunity, profits, corporate health and a host of other factors.

More than half the Sounding Board expects that advertising in support of consumer financial services will continue to grow rapidly. Other candidates for faster-than-

crease somewhat.

Agency panelists citing the air of certainty included R.W. Fletcher, chairman of Fletcher/Mayo Associates, St. Joseph, Mo., who said, "The past 12 months have shaken our confidence in our ability to forecast anywhere near as accurately as in the past." Adds Patrick J. McGrath, president of Jordan, Case, Taylor & McGrath, New York, "Caution seems to be making a comeback across business in general."

William Weilbacher, head of Bismark Corp.—a New York-based marketing and advertising consultancy—suggests a deep-seated cause which could affect planning quite broadly. "Advertisers are getting very nervous about advertising expenditure levels. Some are beginning to ask, 'Could we be spending too much?' This question will be asked more frequently in 1986."

On the creative front

We asked the client members of the Sounding Board whether, in light of tight ad budgets, they were working at ways to increase the productivity of creative efforts. We also asked agency members whether they saw moves along these lines among their clients.

An overwhelming 83% of the client participants said yes, they were now involved in the development

special outside talent units.

The agency community senses this restlessness; 45% of the agency executives acknowledge their clients are seeking additional creative resources, and one out of four is aware that clients are looking outside present affiliations for new talent and approaches.

We asked clients how effective they thought these various moves might be. John Porter, vp-marketing and sales, Dole Processed Foods (Castle & Cooke), notes that "special efforts against [particular] market segments are potentially our most cost-effective marketing program."

We asked the agency members of the Sounding Board whether they saw any shift in who is taking the initiative in these creative changes—client or agency? Quite a few noted that agencies were taking the lead—or certainly should as a fundamental part of their assigned responsibility.

Yet a good number also commented that clients seem to be getting a great deal more active in initiating or urging their agencies to undertake new moves designed to improve the selling power of creative efforts.

Media planning and buying

Media planning and buying is a fruitful area for change and improvement as the hunt for "budget enhancers" intensifies, according to members of the Sounding Board. As with creative and budget planning, action seems under way among advertisers and agencies.

The most widespread area of attention on the media front, according to the Sounding Board, has to do with more sophisticated data and analysis techniques that relate prospect profiles to demographics and to media audiences.

Three-fourths of the clients note they are active in this type of work and three out of four agency managers state their media departments are more active than ever in study and analysis of this type.

Two-thirds of the clients also tell us they're using or testing different media forms. References here include the integration of direct-mail campaigns with more traditional broadcast and print forms; the inclusion of Yellow Pages directory advertising as a selling medium; the addition of tightly focused cable tv schedules to augment wider tv efforts, and use of entirely new approaches to out-of-home availabilities in key urban locations. And 73% of our agency participants say they are more involved than ever in this broadening out of media efforts to less traditional approaches.

But this battle for greater media effectiveness exists among the standard media categories as well. More than six out of ten company ad executives state they are involved in altering their usual media mix. Close to half of the agency panel—48%—see the same thing happening with media plans developed within their agencies.

A very new development in media planning and buying is, of course, the growing availability of 15-second announcements in tv. More than two-thirds of the agency segment (68%) tell us that they already are considering or using these new commercial lengths—a point echoed on the client side, where almost half the advertisers (48%) already are making this adjustment.

More than half the clients (57%) also note they are shifting the balance between national and local media components, apparently as a result of improved skills in adjusting advertising weight geographically. Agency management also spots this trend, but some less broadly (41%).

Significant minorities—anywhere from one-third to 45% of

Words of wisdom

A sample of views from members of the Advertising Age Sounding Board on what to do to strengthen the effectiveness of advertising. The question: "What suggestions would you offer to fellow advertisers and agencies to improve productivity in our field?"

Advertisers should become more involved with the media and creative process. Independent analysis—then joint decision—make for more effective and efficient use of advertising dollars. Christopher Wackman, Subaru of America.

Work hard, be open-minded, be focused and creatively take no prisoners! Patrick Fallon, president, Fallon McElligott Rice.

Proceed cautiously as you consider "new" media options/mixes. Continue to pressure the agency and the media source for more audience information—and don't hesitate to experiment, but where possible take steps to make it a true learning experience with measurable results. Joseph Kelach, senior vp-marketing, American Dairy Assn.

Greater reliance on upfront (i.e., strategic) research, less on copy testing. Better pinpointed strategies, better creative product. Edward Waz, president, Saatchi & Saatchi Compton.

1. Involve fewer and more senior people in decision-making process at both agency and client company.

2. Greater focus on alternatives to network tv in particular and, in general, a more creative approach to media planning.

3. Less "mass-market" approach, more segmented "target-market" thinking in strategy development and execution. R.A. Costello, manager-corporate brand communications, General Electric.

Get out of the box. Manage risk to breakthrough—particularly in television. In print—be patient; it takes much longer than we want to admit. Hans Stern, director-Brown-Forman Media Services, Brown-Forman Corp.

Defend your large, broad-based buys that are capturing 50% of your target bases. They need your support and dollars if they are going to survive. You'll pay big when they're gone. And we could see them collapse in five years. Robert Miller, president, Miller Meester Advertising.

Get rid of layers—have fewer decision-makers. Get key people to write the copy and key people to agree on it. Would David Ogilvy have done away with the seven layers of brand management? Cream can't rise to the top if it's filtered in cotton balls! Henry Kornhauser, ceo, Kornhauser & Calene.

Get more entertainment value into advertising. Experiment with new and unique media vehicles. Do more/better testing of strategy before writing advertising. H.M. Baum, president-U.S. division, Campbell Soup Co.

In order for advertising to be effective, the first consideration is that it needs to be arresting. The second consideration is that it should be intellectually and emotionally rewarding; people give the advertiser their undivided attention and in exchange they receive a reward. This reward is in the form of a smile or laugh, a piece of information, or a conscious involvement with the ad that establishes rapport with the advertiser. Effective advertising is created by an informed group of people who know why the product or service is a good buy; know what the product or service offers; know what kinds of people are good prospects, and know why they should want the product or service. Stan Richards, principal, Richards Group.

Be willing to invest in consumer research prior to strategy development. Avoid highly visible media unless they really fit product needs. Be willing to reach the consumer in little bits and pieces, which is more complex and time-consuming, but critical to future marketing. John Porter, vp-marketing and sales, Dole Processed Foods, Castle & Cooke.

A point of view offered by William Claggett, vp, Ralston Purina Co., touches on many issues raised in this poll.

How the business outlook for 1986 affects the management of the media function:

Many advertisers tell us 1986 will be a year in which sharper focus will be placed upon increased productivity in all areas. Since advertising is usually the biggest variable in large advertisers' budgets, it stands to reason that emphasis will be placed upon making the most effective possible media purchases, attempting to hold down tv production costs and making sure that agency commissions and fees should be targeted against the most productive assignments.

The sudden rash of megamergers in the communications industry will result in the very biggest agencies having more buying clout, commercial piggybacking opportunities, media resources and budget flexibility than ever before. This may put medium-size agencies and independent large advertisers at a disadvantage, so they're going to have to do everything possible to stretch out their dollars. In many cases this will result in increased efforts to examine media alternatives to network television, more emphasis on tv production costs, a more widespread use of 15-second commercial lengths and the investigation of new media combinations. It seems to me that alert advertisers can achieve their objectives, but they will have to pay more careful attention to all of these cost areas and be willing to examine a wider range of options.

both groups—point to other moves, such as adjusting daypart mixes in broadcast and modifying the timing of media schedules, either by tightening up seasonal efforts or using in-and-out patterns more aggressively.

A particularly revealing clue to how widespread and insistent the search is becoming for improvements in media productivity comes from the fact 50 of the top agency executives queries—three-quarters of the entire group—tell us that their clients are becoming much more involved in media matters

and at much more senior levels.

A top movie industry marketing executive said his department and agency are adjusting advertising plans for each feature film distributed to focus on who they know will be best prospects.

Robert Lauterborn, director-marketing communications and corporate advertising, International Paper Co., believes "a tighter focus on smaller segments" will be particularly effective in his company.

Other comments pointed to the

Ad spending - Table 5

"What do you, personally, believe will be the industrywide spending situation next year?" Figures represent per cent of respondents agreeing. Source: AA Sounding Board.

	Total	Advertisers	Agencies
Up strongly in dollars and weight	6%	8%	4%
Up in dollars, but weight about same level	36%	36%	37%
Slowing rate of growth	38%	39%	40%
Declining in weight and possibly dollars	5%	8%	1%
Unclear trend—varies by category	13%	8%	17%

average gain include fast-food entries, communications and entertainment and soft-drink brands.

On the other hand, some long-established categories are expected to decline in relative importance. Almost a third of the panel expects a significant drop in tobacco and liquor advertising. Large numbers of respondents also sense that budgets will be tightening for brands in the chemicals, gasoline, electronics and office-equipment areas.

Clients tend to be more bullish about faster advertising dollar growth in the automobile category than is true of our agency participants. They also are more optimistic spending will hold up for chemicals and gasoline.

On the agency side, opinions are considerably more optimistic for major new spending growth in both pharmaceuticals and among retail chains.

Tom Purcell, corporate director of advertising and marketing services, Geo. A. Hormel & Co., Austin, Minn., observed that flux and change is normal and expectable: "The economy is such a mixed bag. I feel some parts are 'consolidating,' some 'reassessing,' some moving full-bore. Consumer income and life styles will continue to crown new heroes and dethrone old kings."

Victor Galef, vp-marketing, SmithKline Beckman Corp., Philadelphia, notes unusual uncertainty, which clouds the outlook: "Economic trends are not yet clear, and I believe product advertisers will take more of a 'wait and see' attitude before committing increased spending over inflationary rates."

Michael Kirby of Xerox agrees and adds that major mergers by big advertisers will generate higher discount levels for more brands, thus holding down the rate in-

and testing of new creative strategies for established brands. Another 10% volunteered that they planned to take such action.

Confirmation that a great deal of effort is under way on the creative front comes from the agency side, where 79% of the agency executives polled see more activity than ever, with both clients and agencies.

Three out of four clients also tell us they're considering or evaluating special efforts against specific market segments or new target areas. And 85% of the agency managers responding agree that there's more action now in probing for new niches for established products.

The search also goes on in reassessing brand attributes to find new uses or applications for products; 60% of the clients and 70% of the agency respondents tell us work along these lines is under way.

Still another aspect of the search for better ways to handle creative has to do with using new creative units (15-second spots in broadcast, fractional space in print) and experimenting with quite different media formats. That plenty is going on here, too, is evident when 76% of the marketers and 71% of the agency heads mention action of this type.

In this search for greater effectiveness, clients are looking around for new sources of talent, both within their own organizations and agencies or even outside. Just about one-third of the clients responding state they are augmenting or tapping into added creative resources within their companies or getting new teams at their agencies assigned. A significant minority (17%) say they are scouting for and appointing entirely new creative resources—other agencies or

Board

(Continued from Page 28)
emergence of 15-second announcements as offering new opportunities for major improvements in efficiency.

Xerox's Michael Kirby urges the industry to "curb the use of 15-second commercials which will contribute to clutter and potentially reduce effectiveness." Yet some feel economic forces are working for greater availability of the new unit. Noted Victor Galef of Smith-Kline Beckman: "The trend to 15 seconds will increase in tv and will bring smaller brands, which can't currently afford tv, back to the medium."

Balance of ads and promotion

To improve short-term sales results, many consumer-goods marketers shift funds from advertising to promotion. Traditional thinking holds that media advertising works longer-term, building awareness and favorable attitudes in order to strengthen brand franchises for the future. Merchandising and promotion efforts, on the other hand, are expected to give an immediate and measurable boost to volume.

In our panel, somewhat more than a third (35%) of our advertiser panelists stated they were moving more money into promotion—and presumably taking it away from media efforts—in their 1986 planning. But there apparently is a great deal of contrary motion as well—another 20% tells us that budgets are shifting the other way from promotion into media. For close to half the clients who responded, no significant alteration in either direction is being made now.

On the agency side, more than half (52%) the agency executives note their clients are intensifying promotion efforts at the expense of media programs. Only 12% see funds moving in the other direction. One possible reason agency people are more inclined to see a shift toward promotion is the greater diversity of client interests represented in their rosters. Another is their greater sensitivity to this kind of attrition in billings.

Spotting the likelihood that the two approaches be combined is Brad B. Moore, director-advertising and tv programming, for Hallmark Cards, who notes that in his company's case "copy approaches are being looked at to make the advertising itself more 'event/promotion' oriented..." Ronald Cox of Wrigley makes the point for advertising quite strongly: "While we are clearly out of phase with trends, we refuse to fall into the promotion trap. Advertising sells goods!"

Advertising effectiveness

Considering that limited advertising dollars will have to work harder than ever, what about the changing environment within which messages will have to fight for attention—and recall—and response?

We asked each member of the panel to what degree he or she personally thought clutter, "zapping," audience erosion, inattentiveness, growing ad volume or other negatives might impair the effectiveness of advertising itself over the next several years.

One-fourth of our panel believes advertising will be less effective in the future—and to a

marked degree. Clients seem to be relatively more pessimistic than their agency counterparts, 28% of the clients and 23% of the agency members thinking there's real trouble ahead in the continuing ability of advertising to get through effectively. An additional 42% believes advertising may hurt—but to a less drastic degree.

What about the likelihood of an improvement—that advertising might actually gain in effectiveness in the near future? Only one in ten, over-all, felt any optimism; 7% of the advertisers and 13% of the agency heads see improvement on the horizon.

Quite a few Sounding Board members volunteered comments that a particularly worrisome problem is the extreme fractionalization of audience as media become more targeted and competitive in their own fight for share.

The picture, though, is not unreliably bleak. Quite a few execu-

tives feel there are hopeful signs in a perceived rededication to advertising which is properly focused and compellingly executed. Many use the word "breakthrough" to describe the advertising they are working hard to achieve.

On the negative side, many volunteered the view that there were intensifying problems in clutter, "lazy" strategy work, poor or indulgent execution and escalating media costs.

On the "plus" side, many pointed to the "demassification" of media—offering more opportunities to reach specific audience targets with less waste. Additionally, it's obvious that many clients and agencies are confident about—and proud of—the intensity of work now under way to move their respective advertising efforts to a higher plane of effectiveness and to minimize the damage they sense being done to commercial messages in general. #

The Advertising Age Editorial Sounding Board

Formed several years ago in answer to a need for a broad-based forum of senior management opinion across the entire range of American marketing and advertising, the *Advertising Age* Editorial Sounding Board was updated several months ago.

Top-ranked marketing directors and advertising executives from 92 of the 200 largest American advertisers signed on, agreeing to respond to several questionnaires during the year dealing with matters of broad current concern in the business.

They are joined by a representative of top management from 130 of the 200 largest U.S. advertising agencies (in terms of U.S. domestic billings) and 11 prominent consultants active in marketing, communications and advertising strategy work.

The Sounding Board is under the chairmanship of Herbert Zeltner, a consultant in marketing and advertising and frequent contributor to *Ad Age*.

The complete list of members appeared in the Jan. 13 issue. In that listing, the section on consultant members was partially incorrect due to a transmission error.

The correct list of consultants:

Alvin A. Achenbaum, Canter, Achenbaum Associates; Stephens Dietz, Dietz & Erickson; Robert M. Prentice, Cos Cob, Conn.; William M. Weibacher, Bismark Corp.; Michael P. Ryan, Darien, Conn.; Eugene Jacobson, Dallas; Paul Jordan, Glendale, Cal.; Jim Mortensen, Briarcliff, N.Y.; H.E. McDonald, H.E. McDonald Associates; Charles Bradford Jones, Chicago; Steve Tart, Steve Tart & Associates.

The 1985 Ad Dollar Summary lists 35,000 Brands and how much they spent in 7 Media. You can't buy this complete listing anywhere else.

These are the official industry figures.

If you want to know who's spending what on advertising, BAR/LNA's Ad Dollar Summary is the reference tool you need.

Because only in this one volume will you find a complete summary of ad dollars from the PIB Magazine and Newspaper Supplement Service, from BAR's Broadcast Services and from the LNA Outdoor Advertising Service.

These are the very same figures LNA prepares for major media organizations like MPA, TVB, RAB, and OAAA. They're used by leading advertisers and their agencies. The trade journals also turn to LNA for media data.

The 1985 Volume now includes cable TV.

The Ad Dollar Summary tells you how much each of 35,000 brands is spending in consumer magazines, newspaper supplements, network and spot television, network radio, outdoor advertising, and now, for the first time, in cable TV.

Brands are listed in alphabetical order along with their parent company identifications and the media used.

And that's not all. For the first time we've added listings that show the top 100 companies ranked by expenditures in each of the media.

Top 1000 Companies by total ad dollars. The Ad Dollar Summary includes other vital reference data.

For instance, there's a convenient listing of Top 1000 Companies ranked in order of total media expenditures and broken out in each of the seven media.

There's also a section in the year-end edition showing the top 10 brands in 275 product categories, with a category total.

Year-End 1984 Edition on sale now.

If you didn't subscribe to the last year's Ad Dollar Summary, now is your chance to order the entire year round-up in one conveniently bound edition for just \$150.00.

Multi-Media Services from BAR/LNA.

The Ad Dollar Summary is just one of the Multi-Media reports we offer, and the only one available without subscribing to the full service. Our full-service subscribers receive two additional reports which complement the Ad Dollar Summary with more detailed analyses.

- Company/Brand—an alphabetical listing of companies and how much is spent on each brand in seven media.

- Class/Brand—compares competitive brands within 275 product categories. This enables you to see not only how much each brand spent in specific media, but also who the major spenders are in each category.

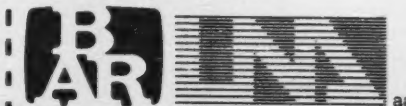
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Government pinches Chinese ad industry

By LYNNE REAVES

BEIJING—The Chinese government is taking steps to regulate the advertising industry here, which has grown substantially since major reforms were introduced in 1979 that opened the door for Western-style marketing.

New regulations include rules on ad content, the government registration of local ad agencies and a ban on all outdoor boards along Changan Avenue, this city's main thoroughfare (AA, Dec. 16).

A recent circular on advertising restrictions issued by the government said "No slanderous propaganda, obscenity or superstition will be allowed, and the wording [of ads] must not be harmful to national dignity or pander to low tastes."

Also, late last year the government ordered all local advertising agencies to register with the bureau of industry and commerce.

There are hundreds of such operations that call themselves ad agencies, but in fact they are

mostly small graphics shops that have opened all over China in the past few years.

In a further tightening of the reins, additional regulations stipulate that the media "must stop coercing businesses into turning over funds to sponsor advertisements."

The government said advertising departments of mass media agencies often charge their customers exorbitant fees for ads that simply display the name of the business at the end of a tv program or on a newspaper page.

Western admen said the outdoor board ban resulted from growing anti-Japanese sentiments among Chinese officials. Both local and foreign advertisers will be affected by the order, but most of the 50 boards on Changan Avenue promote Japanese cars and electronic goods—items the average Chinese cannot afford.

Doug King, managing director at Jardine-Interpublic in Hong Kong, said the outdoor board ban "has given people a lot to think about," but added that ad executives should not overreact.

"Outdoor boards are the very visible focus of the Japanese presence in China, and the Chinese have been trying to tell the Japanese they are unhappy with their trading relations for some time," he said.

He also said the Japanese may have been "overaggressive" in their advertising.

"They are obviously the most visible," he said. "In the future, I believe people will be more careful. We may see more corporate-image ads instead of the 'Mine is the best product. Buy it' approach."

World News Roundup

(Continued from Page 3)

channel that would be supported by advertising. The three existing channels in Switzerland are government-controlled.

LONDON—Bristol-Myers moved its \$3 million Clairol hair color business to Boase Massimi Pollitt. Geers Gross lost the account last year.

SYDNEY—Kellogg Co. added a third agency in Australia by giving SSC&B:Lintas the estimated \$3.3 million Special K and Sultana Bran business. J. Walter Thompson Co. previously handled the cereal brands.

LONDON—Mars Inc. added Grey Advertising to its U.K. roster by moving its \$2.2 million Thomas pet snack account from Clarke Lee & Nightingale.

MILAN—FMR, the glossy, upscale Italian art magazine published by Franco Maria Ricci, will launch three new European editions this spring in English, French and German.

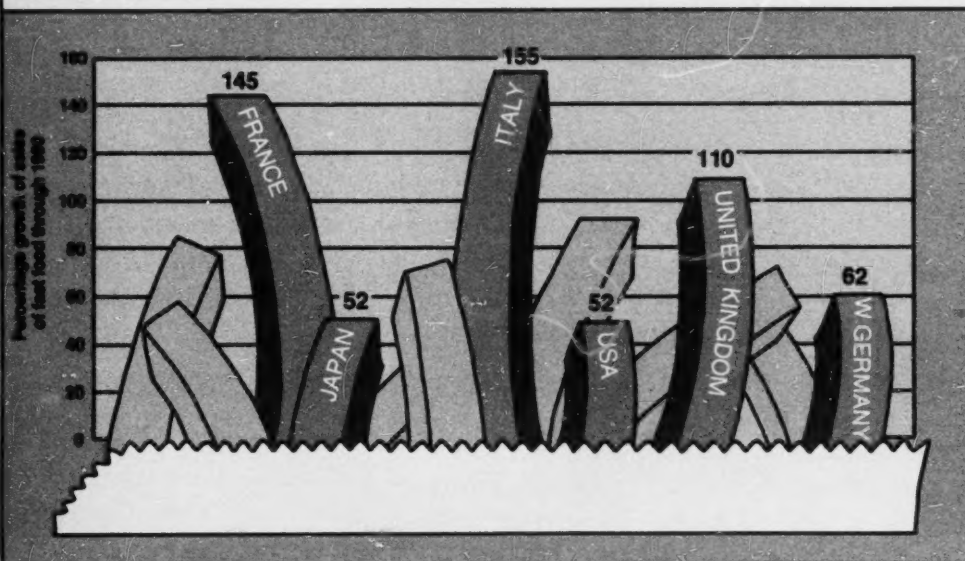
TOKYO—Japan Victor will introduce in February in Japan a low-cost, light-weight video recorder movie camera, called GR-C7. It will hit the U.S. this spring under the JVC label. Dentsu is Victor's agency.

MILAN—Saatchi & Saatchi-Compton picked up the \$1.5 million Tuborg beer account. No previous agency.

BANGKOK—Thai Airways moved the creative part of its domestic account to BBDO affiliate Thai Image from in-house.

Fast-food's global growth, 1984-1990

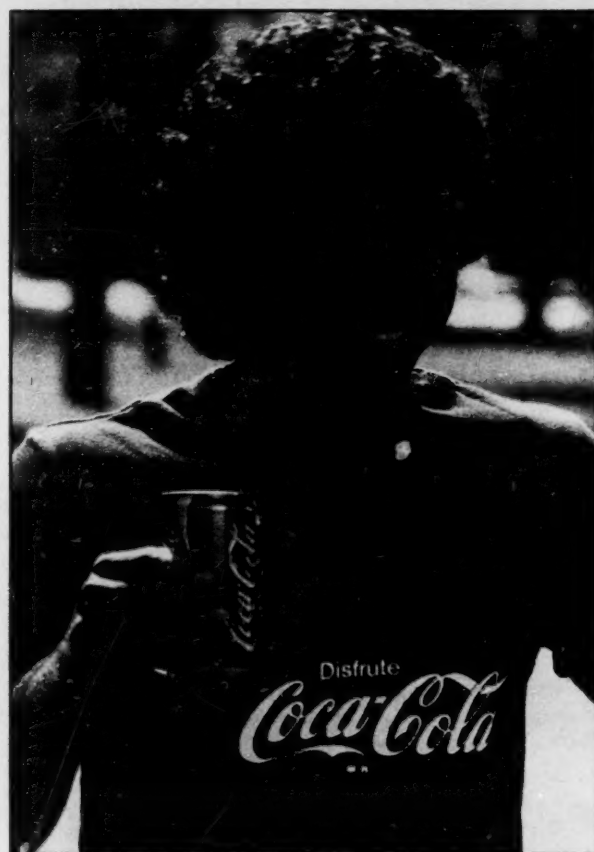
Fast-food sales growth in Italy, France, the United Kingdom and West Germany is expected to outpace U.S. through 1990, with the strongest demand for Mexican, oriental and "health" foods. But the U.S. remains the fast-food leader with a projected \$60 billion in sales by 1990. Japan is next with \$2.8 billion and the U.K. third with \$1.93 billion. Source: Euromonitor (London).



Europeans catching fast-food fever

Fast-food popularity is growing at such a pace that it could revolutionize European eating habits over the next decade, according to Euromonitor, a market re-

search organization. Statistics show that fast-food operations outside the U.S. are heavily dominated by American chain or franchise operations.



Soccer star Hugo Sanchez touts numerous products in Mexico.

Soccer star shines in ads

By STEPHEN DOWNER

MEXICO CITY—The U.S. may have William (The Refrigerator) Perry, but Mexico has Hugo Sanchez.

Mr. Sanchez is neither as physically imposing as the Chicago Bears' Mr. Perry, nor does he play football. But like the 'Fridge, Mr. Sanchez, a soccer star, is the hottest athlete in Mexico when it comes to product endorsements.

His endorsements have been so extensive that even those who are not familiar with Mr. Sanchez' soccer prowess know him from his appearances in ads for Coca-Cola Co., Ford Motor Co., Richardson-Vick's, Adidas and his own clothing line.

This year, Mr. Sanchez will appear in Coke ads in the U.S. in eight states with heavy Hispanic populations, according to his business manager Jorge Berlanga. Mr. Berlanga estimated his client earns "at least \$1 million a year" from endorsements.

A Mexican native who began his career with a minor-league soccer team here, Mr. Sanchez later graduated to the major leagues and played with a local team called Universidad. In 1978 he began playing for Mexico's national soccer team and in 1980 he moved to Spain to play for Atletico Madrid, a popular professional team. He played there for four years, scoring more goals than any other soccer player in Spain.

Last year, the 27-year-old Mr. Sanchez signed a five-year contract with Real Madrid, one of the world's most famous pro soccer teams. This season he is the team's leading scorer.

Real Madrid, the leading Spanish team, paid \$2.5 million for the rights to purchase Mr. Sanchez from Atletico Madrid, but Mr. Berlanga declined to divulge his client's annual soccer salary.

The transfer to the prestigious Real Madrid team turned Mr. Sanchez into an idol in his homeland, a country known for its passionate soccer fans.

In addition to his endorsements, Mr. Sanchez comments on Spanish soccer every week for Televisa, Mexico's largest tv network, which transmits all Real Madrid games live.

Ad executives also say that Mr. Sanchez is easier to work with than most professional athletes.

"He is very smart," said Marco Antonio Bravo, creative director for J. Walter Thompson de Mexico, which handles Ford. "He thinks. He doesn't just open his mouth. In many cases youngsters are so good at games at school that they forget their formal education. He didn't."

Indeed, Mr. Sanchez is unique among Mexican athletes. Aside from soccer, he has a degree in dentistry and practices twice a week at a Madrid clinic.

But some say the extent of Mr. Sanchez' exposure to the Mexican (Continued on Page 41)

Consumer Magazine Ad Linage

Advertising pages for U.S., Canadian and foreign consumer publications

January

	Pages	
	Jan. 1986	Jan. 1985
— Art & antiques —		
American Artist	80.1	68.4
Antiques	—	—
Art in America	—	—
Southwest Art	56.2	69.5
Total Group	136.3	137.9
% change	—	-1.2%

— Auto/cycle/rec. vehicles —

Autoweek (52X)	—	—
Car & Driver	117.2	110.6
Car Collector & Car Classics	14.3	21.0
Car Craft	—	—
Cycle	28.7	32.3
Cycle Guide (11X)	—	—
Cycle World	37.7	39.1
Dirt Rider	—	—
Dune Buggies & Hot VWs	92.1	76.1
Family Motor Coaching	177.7	176.7
Four Wheeler	74.5	70.3
Hot Rod	—	—
Motorcyclist	—	—
Motorhome Life	84.9	94.7
Rider	29.2	33.3
Road & Track	79.9	96.3
3 Wheeling	64.9	46.6
Trailer Life	101.5	107.8
Total Group	902.6	904.8
% change	—	-0.2%

— Boating & yachting —

Boating	161.0	145.8
Chesapeake Bay	30.0	26.1
Cruising World	111.5	124.4
Lakeland Boating (10X)	59.5	50.7
Motor Boating & Sailing	232.9	215.1
Sail	103.5	118.6
Sea	—	—
Small Boat Journal	—	—
Trailer Boats	40.5	29.5
Western Boatman	54.7	54.1
Yachting	190.9	216.4
Total Group	984.5	990.7
% change	—	-0.6%

— Canadian —

L'Actualité	51.3	27.2
Châtelaine	—	—
English Edition A.	61.4	60.9
French Edition	51.1	43.5
City Woman (5X)	—	—
City and Country Home	—	—
Equinox (6X)	—	—
Financial Post A.	31.1	30.0
Flare A.	27.5	37.4
Homemaker's (10X)	—	—
Madam Au Foyer (10X)	—	—
Macleans (52X) A.	71.5	75.3
Montreal Magazine (10X)	22.0	35.8
Montreal Ce Mois Ci	23.0	35.8
Reader's Digest	—	—
Canadian-English A.	77.3	81.9
Canadian-French A.	68.5	92.9
Toronto Life	61.5	61.1
Vancouver	—	—
Total Group	546.2	581.8
% change	—	-6.1%

— Civic/fraternal —

American Legion	28.9	28.7
Elks (10X)	20.1	25.5
Kiwanis	16.9	13.6
Lion (10X)	7.3	6.7
Rotarian	11.0	13.6
V.F.W. (11X)	30.1	23.9
Total Group	114.3	112.0
% change	—	+2.1%

— Comics —

DC Comics	7.0	9.0
Marvel Comics Group	7.0	4.5
Total Group	14.0	13.5
% change	—	+3.7%

— General —

American Health (10X)	56.5	42.2
American West (6X)	50.5	25.5
The Atlantic A.	39.3	36.7
Audubon Magazine (6X)	30.3	30.9
Bon Appetit A.	57.0	56.2
Changing Times	49.1	35.4
Connoisseur	45.3	42.1
Consumers Digest (8X)	—	—
Ebony	70.5	63.9
Fifty Plus	41.4	34.3
Food & Wine	33.3	33.9
Games	22.5	16.9
Gourmet	—	—
Home Entertainment	36.3	29.0
Harper's Magazine A.	23.5	27.2
Life	68.5	77.8
Modern Maturity	—	45.6
Money	98.2	95.4
Moneysworth (4X)	77.2	13.8

	Pages	
	Jan. 1986	Jan. 1985
Mother Earth News (6X)	53.3	53.0
Mother Jones (9X)	22.2	13.3
National Geographic	—	—
Natural History	51.0	43.2
Prevention	59.6	64.6
Psychology Today	19.4	26.7
Reader's Digest A.	71.8	51.3
Saturday Evening Post (9X)	38.2	30.7
Signature	52.0	39.1
Smithsonian	85.8	68.0
Success B.	60.2	53.1
Sylvia Porter's Personal Finance (6X)	—	—
Town & Country	86.5	86.9
Travel-Holiday	34.5	37.3
Travel & Leisure	86.7	59.3
Vanity Fair	37.0	28.2
Writer's Digest	19.6	23.5
Yankee	74.4	71.4
Total Group	1,581.6	1,456.4
% change	—	+8.6%

— Home —

Americana (6X)	—	—
Architectural Digest A.	103.5	75.6
Better Homes & Gardens	63.2	65.4
Colonial Homes (6X)	52.4	46.1
Country Home	38.5	30.6
Country Journal	19.8	37.2
Country Living	62.2	57.3
Dallas/Ft. Worth	—	—
Home & Garden	82.3	54.7
Family Handyman (10X) A.	57.9	61.6
Flower & Garden (6X)	—	—
Home	—	—
The Homeowner (10X)	35.2	32.5
House Beautiful	55.2	58.5
House & Garden	61.1	67.8
Houston Home/Garden	54.0	73.0
Metropolitan Home	32.3	38.7
New Shelter (9X)	43.5	51.7
1,001 Home Ideas	33.9	25.8
Phoenix Home/Garden	56.0	63.5
Roadside's Organic Gardening	76.7	69.7
Rx Being Well	22.0	19.0
San Diego Home/Garden	73.0	57.0
South Florida Home/Garden	—	—
Southern Accents (6X)	108.8	74.4
Southern Living	95.4	80.0
Sunset Magazine A.	96.0	84.2
Texas Homes	83.0	94.2
Workbench (6X)	51.2	56.8
Total Group	1,457.1	1,375.3
% change	—	+5.9%

— Inflight & other passenger —

Aboard Group (6X)	—	—
Alaska Airlines	58.3	38.6
American Way (26X)	92.1	86.5
East/West Network:	—	—
Eastern Review	89.8	84.2
Frontier	39.5	26.3
Northwest Orient	45.2	34.2
Ozark	46.5	34.3
PSA Magazine	88.5	66.0
Pan Am Clipper	50.2	55.0
Republic Scene	46.6	43.2
Spirit	85.5	53.3
United	85.6	78.7
Western's World	63.8	44.3
Halsey Publications:	—	—
Air Cal	42.3	39.3
Delta Sky	62.3	56.3
USAir	34.8	39.7
People's Expressions	31.0	0.0
Hawaii (6X)	20.8	23.7
Pace	59.8	53.0
Spirit of Aloha (6X)	20.3	23.6
TWA Ambassador	41.3	39.0
Total Group	1,104.2	919.2
% change	—	+20.1%

— Men's —

Esquire A.	43.5	43.3
Firehouse Magazine (13X)	41.6	43.3
Gentlemen's Quarterly A.	56.8	58.5
M Magazine	26.3	28.0
Penthouse A.	46.3	51.9
Playboy A.	72.5	93.9
Total Group	287.1	318.9
% change	—	-10.0%

— Metropolitan —

Aloha (6X)	25.2	28.2
Atlanta	46.9	50.7
Baltimore	56.5	58.5
Boston	131.7	145.8
California:	—	—
Chicago	82.8	97.3
Chicago's North Shore	77.8	81.2
Cincinnati	52.9	56.4
Cleveland	60.3	74.2
Columbus Monthly	50.2	75.6
Connecticut	83.4	72.9
D/Magazine, Dallas/Ft. Worth	112.0	116.0

	Pages	
	Jan. 1986	Jan. 1985
Denver	32.2	18.5
Detroit Monthly	144.6	51.1
Grand Rapids	66.2	36.0
Gulfshore Life (10X)	—	—
Honolulu	58.5	79.1
Houston City	40.7	72.0
Indianapolis	39.4	32.5
Kansas City	19.9	31.4
Los Angeles	126.3	143.5
Louisiana Life (6X)	—	—
Madison	60.0	80.0
Metropolitan Detroit	49.0	76.5
Miami Mensual	51.8	40.5
Miami/South Florida	89.0	99.6
Mid Atlantic Country	24.5	28.8
Milwaukee	47.3	54.3
Minneapolis/St. Paul	64.8	112.0
Nashville	51.0	28.0
New England Monthly	43.2	39.8
New Jersey Monthly	62.9	54.8
New Mexico	42.9	58.5
Ohio	60.5	52.8
Oregon	—	—
Orlando	97.5	98.0
Palm Beach Life	94.0	118.1
Palm Springs Life	—	—
Philadelphia	113.3	102.0
Phoenix	103.4	117.2
Pittsburgh	38.2	48.8
St. Louis	38.7	53.0
San Diego	126.4	163.8
San Francisco	—	—
San Francisco Focus	91.9	74.7
Texas Monthly	194.5	91.7
Twin Cities	39.9	65.3
Ultra	43.2	52.4
Washington Daser (11X)	46.5	66.1
The Washingtonian	112.0	147.0
The Virginian (6X)	58.5	58.0
Total Group	3,252.1	2,358.4
% change	—	-3.2%

— Movie/romance/-radio/tv —

Macfadden's Women's Group:	—	—
Modern Romances	16.5	14.0
Secrets	16.5	14.0
True Confessions	16.5	14.0
True Experience	16.5	14.0
True Love	16.5	14.0
True Romance	16.5	14.0
Sterling Women's Group:	—	—
Daytime TV	23.8	28.5
Modern Screen	—	—
Movie Mirror (6X)	—	—
Soap Opera Stars	—	—
TV Movie Screen (6X)	—	—
TV Picture Life (6X)	—	—
Total Group	122.8	112.5
% change	—	+9.2%

— Music/entertainment —

American Film (10X)	—	—
Audio	94.5	105.5
Circus Magazine	34.5	45.0
Dance Magazine	53.9	56.1
Musician	54.8	48.7
Playbill	38.5	43.6
Record	—	—
Stereo Review	58.6	47.2
Video Magazine	86.3	78.2
Video Review	62.0	63.0
Total Group	483.1	487.3
% change	—	-0.9%

— National Sunday magazines —

Parade (52X)	46.8	47.1
Total Group	46.8	47.1
% change	—	-0.6%

— Outdoor & sport —

Alaska	35.9	53.6
The American Handgunner (6X)	35.0	33.0
American Hunter	22.1	15.2
American Rifleman	28.1	26.7
Backpacker (6X)	23.1	25.3
Base Master (9X) A.	50.4	47.4
Bicycling (10X)	60.1	80.7
Duck's Unlimited	28.8	20.5
Equestrian	53.8	52.4
Field & Stream	62.4	55.0
Fins & Feathers A.	31.9	—
Fishing World	33.1	30.1
Florida Sportsman	—	—
Flying	34.2	39.9
Fur-Fish-Game	—	—
Golf Digest	97.6	107.4
Golf Magazine	135.3	137.5
Guns	29.0	21.0
Handgunner	35.0	33.0
In-Fisherman (6X)	67.5	48.0
Muscle & Fitness	107.7	103.3
Outdoor Life	62.5	43.2
Outside Magazine	30.3	28.6
Runner's World (12X)	28.2	33.0

	Pages	
	Jan. 1986	Jan. 1985
The Runner	25.8	27.0
Salt Water Sportsman	161.4	76.1
Sierra	36.1	30.9
Shooting Times	53.5	27.8
Ski (8X) A.	115.8	75.5
Skin Diver	84.7	87.8
Southern Outdoors (9X)	39.0	38.1
Sport	31.2	36.5
Sports Afield	73.2	61.0
Tennis	40.5	51.1
Western Outdoors (10X)	35.3	30.3
Total Group	1,788.5	1,577.7
% change	—	+13.4%

— Photography —

American Photographer	34.3	38.7
Petersen's Photographic	—	—
Popular Photography	65.1	89.2
Total Group	99.4	127.9
% change	—	-22.3%

— Religious —

Christian Herald (11X)	29.8	33.3
Christian Life	22.6	24.9
Christianity Today (18X)	50.0	47.2
Inside (4X)	—	—
Moody Monthly (11X)	47.7	50.7
Total Group	150.1	156.1
% change	—	-3.8%

— Science/electronic/-mechanic —

Creative Computing	—	—
Discover	37.3	34.7
Family Computing	54.3	62.5
Home Mechanic	55.8	59.0
Info World (52X)	98.0	201.0
Omni	45.1	46.4
Personal Computing	111.3	154.4
Popular Mechanics	81.5	81.9
Popular Digest	68.2	49.7
Science Digest	16.4	31.7
Science '85 (10X)	—	—
Scientific American	33.4	46.4
Spectrum	106.3	113.9
Total Group	707.6	881.4

(Continued from Page 55)

December

Business

	Current month		Year-to-date	
	1985	1984	1985	1984
Advantage	50.1	38.0	615.0	648.0
Arizona Bus. Gazette (52X)	37.8	39.2	368.5	320.2
Atlanta Bus. Chronicle (52X)	77.4	36.9	714.3	560.7
Austin Bus. Journal (52X)	54.7	50.2	548.2	694.4
Baltimore Bus. Journal	173.0	70.0	951.5	769.1
Barron's (52X)	193.6	176.2	2,307.1	2,350.2
Boston Bus. Journal (52X)	—	—	—	—
Business Atlanta	90.0	81.5	841.4	723.4
Business First of Buffalo	64.4	76.3	742.2	152.6
Business First of Columbus	73.9	—	819.5	—
Business North Carolina	34.8	23.8	—	—
Business Week (52X) A.	396.3	432.8	4,214.6	4,971.6
California Business	—	—	—	—
Capital District Business	—	—	—	—
Review (25X)	—	—	—	—
Corporate Report/-	—	—	—	—
Kansas City	50.9	65.8	547.6	747.0
Corporate Report/Minnesota	77.8	68.5	1,120.1	1,022.0
Crain's Chicago Bus. (52X)	154.9	120.0	1,945.6	1,630.0
Crain's Cleveland Bus. (52X)	62.0	57.1	813.7	895.8
Dallas/Ft. Worth Bus. (52X)	—	—	—	—
Dun's Business Month	56.0	42.0	817.0	612.0
Financial World (24X)	42.0	39.0	530.5	389.0
Florida Trend (13X)	—	62.7	—	1,091.7
Forbes (26X)	395.7	427.7	3,711.2	3,832.9
Fortune (26X) A.	263.6	305.7	3,272.5	3,486.3
Frequent Flyer	54.5	52.3	762.1	705.3
Futures (13X)	44.4	42.5	660.4	659.5
Grand Rapids Bus. Journal	20.6	7.8	233.5	84.4
Hawaii Business	53.4	46.9	595.2	608.2
High Technology	17.2	37.2	346.8	410.6
Houston Bus. Journal (52X)	168.0	192.0	1,713.6	2,015.1
Inc. Magazine A.	—	—	—	—
Income Opportunities	—	—	—	—
Industry Week (25X) A.	61.0	73.6	1,077.1	1,337.1
Indianapolis Bus. Journal (52X)	102.3	89.9	1,471.3	1,352.6
Kansas City Bus. Journal	137.6	161.0	1,771.8	1,644.2
Milwaukee Bus. Journal (52X)	130.3	97.1	1,279.9	1,039.3
Minnesota Bus. Journal	38.7	44.1	584.4	601.8
Nation's Business A.	—	—	—	—
New England Business (20X)	40.2	59.8	1,082.0	878.2
Pacific Business News (52X)	127.8	88.6	1,365.6	1,196.2
Philadelphia Bus. Journal (52X)	113.6	107.3	1,217.3	1,098.9
Pittsburgh Bus. Times (52X)	45.5	111.4	664.3	973.5
Regardie's	87.5	81.5	—	—
San Jose Bus. Journal (52X)	—	—	—	—
Savvy	—	—	—	—
St. Louis Bus. Journal (52X)	150.1	161.6	1,747.4	1,721.6
South Florida Bus. Journal	105.8	73.7	1,122.2	823.1
Texas Business	—	—	—	—
Venture	87.5	87.0	900.6	1,054.6
Total Group	3,934.9	3,828.7	43,476.0	43,101.1
% change	—	+2.8%	—	+0.9%

Newspaper Sunday magazines

	Current month		Year-to-date	
	1985	1984	1985	1984
Arizona Republic	—	—	—	—
Boston Globe	246.6	181.4	2,453.6	2,268.6
California Living	—	—	—	—
Chicago Tribune	138.7	113.1	—	—
Cleveland Plain Dealer	66.2	57.2	618.8	704.1
Columbus Dispatch	91.9	45.0	624.9	599.6
Denver Post	—	—	—	—
Detroit News	168.0	184.0	1,636.0	1,686.0
L.A. Times Home Magazine	181.0	296.0	1,046.0	1,310.0
Louisville Courier-Journal	118.0	99.6	964.3	910.6
Miami Herald	81.1	57.1	560.5	622.4
New York News	—	—	—	—
New York Times Magazine	375.9	406.8	4,345.3	4,682.5
Philadelphia Inquirer	121.1	125.6	649.0	800.6
Seattle Times	116.0	46.0	680.0	289.0
Toledo Blade Magazine	74.8	58.2	571.1	625.6
Washington Post	124.2	151.3	1,405.3	1,385.5
Total Group	1,903.5	1,821.3	15,554.8	15,864.5
% change	—	+4.5%	—	-2.1%

Weeklies/biweeklies

	Current month		Year-to-date	
	1985	1984	1985	1984
The Advocate (26X)	68.6	43.2	1,245.0	1,220.3
Army Times Military Group	—	—	—	—
Air Force Times (52X)	184.2	165.5	1,963.1	1,864.9
Army Times (52X)	177.7	160.0	1,919.1	1,790.1
Navy Times (52X)	189.5	169.9	2,068.8	1,991.3
The Times Magazine	0.2	3.2	112.5	172.3
The Blood-Horse (52X)	1,790.5	2,080.5	6,619.3	7,048.9
Copper's Weekly (26X)	13.1	12.2	307.0	298.0
Commonwealth (22X)	1.8	1.5	81.2	79.9
Golf World (43X)	—	—	—	—
Grit (52X) A.	13.3	11.1	236.2	258.8
National Journal (50X)	—	—	—	—
National Review (25X)	35.2	17.1	336.5	318.8
New Republic (48X)	51.9	57.8	418.0	398.9
New York Magazine (50X)	412.5	362.9	3,121.3	2,955.3
New Yorker (52X)	336.1	380.4	2,989.9	3,529.3
Newsweek (52X) A.	281.5	258.6	2,715.7	3,010.1
People (52X)	496.7	447.3	3,863.8	4,060.5
Rolling Stone (25X)	159.6	131.7	1,174.8	1,085.6
Sporting News (52X)	31.2	37.1	517.8	578.0
Sports Illustrated (52X) A.	250.2	217.5	2,784.3	3,031.7
Time (52X) A.	288.1	264.2	2,690.9	2,821.6
TV Guide (52X) A.	243.4	303.8	3,669.9	3,799.3
TV Update (52X) C.	2,562.0	2,626.0	30,747.0	26,499.0
Us Magazine (26X)	42.4	18.4	—	—
U.S. News &	—	—	—	—
World Report (52X) A.	217.6	178.1	1,776.1	1,758.0
Total Group	7,847.3	7,948.0	71,358.1	68,570.3
% change	—	-1.3%	—	+4.1%

Foreign

	Current month		Year-to-date	
	1985	1984	1985	1984
Business Week Int'l (52X)	178.2	176.9	1,685.8	1,733.9
Cosmopolitan en Espanol:	—	—	—	—
Central America	7.3	8.3	26.5	26.3
Colombia	34.5	23.8	198.7	152.8
Ecuador	3.0	2.0	8.0	7.0
Mexico	81.3	122.1	597.0	684.0

	Current month		Year-to-date	
	1985	1984	1985	1984
Peru	6.0	7.0	33.0	39.5
Puerto Rico	40.0	51.3	284.0	347.0
U.S. (Spanish language)	35.2	23.8	241.3	242.0
Venezuela	44.8	49.3	327.8	265.8
Cosmopolitan Foreign Editions:	—	—	—	—
Australia	107.7	106.9	875.1	826.4
Brazil	94.5	53.0	607.6	503.2
China	53.5	24.0	403.9	—
France	99.5	112.3	1,179.2	1,500.4
Germany	127.7	118.8	1,248.7	1,142.5
Great Britain	155.0	129.0	1,492.0	1,440.0
Greece	55.0	96.0	622.4	670.0
Holland	107.0	79.0	853.3	672.0
Italy	67.3	58.0	626.9	662.5
Japan	58.6	35.6	465.9	382.6
Good Housekeeping Foreign Editions:	—	—	—	—
Australia	35.9	29.4	623.7	394.1
Great Britain	155.0	167.3	1,624.5	1,635.1
Japan	103.0	86.5	—	884.9
Mexico	79.7	85.0	535.8	561.7
Puerto Rico	6.5	15.3	104.0	169.2
Venezuela	55.2	62.3	435.5	379.8
Colombia	63.0	65.3	437.7	437.5
Peru	17.5	19.0	140.5	210.7
Central America	3.0	7.0	13.0	25.5
Chile	1.0	6.0	11.0	16.0
Ecuador	18.0	24.0	196.0	166.5
Geomundo:	—	—	—	—
Central America	9.0	11.0	68.5	81.3
Chile	6.0	9.5	64.5	75.8
Colombia	16.0	14.0	122.5	123.7
Ecuador	6.0	9.0	54.0	54.0
Mexico	12.5	14.0	114.0	111.3
Peru	5.0	5.5	58.5	68.8
Puerto Rico	3.0	4.5	37.0	36.8
Venezuela	10.0	13.0	118.5	130.3
Hombre De Mundo:	—	—	—	—
Central America	12.0	12.2	59.5	90.2
Chile	8.0	10.2	59.5	84.2
Colombia	31.3	19.3	144.3	136.0
Ecuador	9.0	11.2	56.0	64.2
Mexico	29.2	38.7	167.3	225.0
Peru	6.0	6.2	42.5	72.2
Puerto Rico	11.0	16.2	84.0	113.2
Venezuela	45.5	32.2	289.3	237.7
Ideas Para Su Hogar:	—	—	—	—
Central America	—	1.0	—	2.5
Chile	—	1.0	—	2.0
Colombia	27.2	41.7	205.3	266.3
Ecuador	2.0	10.0	61.0	62.5
Mexico	31.2	25.2	150.3	143.3
Peru	2.5	8.0	29.5	75.0
Puerto Rico	1.0	2.5	11.5	14.5
Venezuela	23.0	37.3	227.8	252.8
International Communications:	—	—	—	—
The Middle East	—	—	—	—
International Management:	—	—	—	—
Africa	—	—	—	—
Europe	—	—	—	—
Latin America	—	—	—	—
Middle East	—	—	—	—
Pacific	—	—	—	—
Johnston International:	—	—	—	—
Alam Al-Jarar	51.7	45.5	564.4	683.5
Modern Africa (6X)	25.3	39.0	88.8	156.1
Modern Asia (11X)	45.1	26.5	406.1	387.2
Mecanica Popular:	—	—	—	—
Argentina	7.2	6.2	25.2	64.0
Central America	12.0	20.2	115.8	162.5
Chile	6.3	10.8	42.2	82.3
Colombia	27.8	28.0	188.5	196.8
Mexico	19.7	22.3	183.3	174.5
Peru	10.8	25.5	132.5	196.2
Puerto Rico	9.5	21.2	108.8	176.2
Venezuela	21.0	22.7	165.2	206.2
Newsweek International A.:	—	—	—	—
Atlantic (52X)	—	—	—	—
Latin America (52X)	—	—	—	—
Pacific (52X)	—	—	—	—
Reader's Digest:	—	—	—	—
Arabic	10.5	12.0	108.5	107.5
Asian	288.0	298.0	2,639.0	2,366.0
Australian	51.0	59.5	675.5	865.8
Belgian-Flemish	77.0	90.0	990.0	1,009.5
Belgian-French	46.0	58.5	612.0	664.5
British	51.9	57.9	562.2	666.8
Chinese	222.0	206.0	1,547.5	1,355.2
Danish	16.0	23.5	363.8	377.8
Dutch	48.5	52.5	532.3	490.8
Finnish	16.5	26.5	479.2	488.5
French	16.0	25.1	464.6	538.3
German	70.6	61.5	794.2	811.3
Greek	0.0	6.0	65.5	98.0
Iberian	0.5	11.0	38.0	199.0
Indian-English	103.0	95.0	1,095.0	880.0
Indian-Hindi	8.5	10.0	132.5	83.0
Italian	36.0	57.5	411.0	420.0
Japanese	38.4	66.4	495.3	553.3
Korean	32.8	17.0	315.6	273.0
Latin American:	—	—	—	—
Argentina	17.0	29.0	206.5	256.5
Brazil	5.0	5.0	53.5	40.5
Central American	10.0	11.0	100.0	118.5
Chile	21.5	15.0	141.0	143.5
Colombia	37.0	47.5	341.0	399.5
Ecuador	11.5	9.0	103.5	101.5
Peru	12.5	12.0	118.0	118.5
Mexico	73.7	78.4	610.5	642.0
Puerto Rico	5.5	5.0	56.0	64.5
U.P.B.	12.5	11.0	91.0	96.0
U.S. Spanish	13.5	13.5	124.0	139.0
Venezuela	10.5	14.5	121.5	139.0
New Zealand	56.5	86.5	672.5	1,055.6
Norwegian	12.5	27.0	208.9	443.2
South African	56.0	82.5	1,066.0	1,183.8
Swedish	22.5	9.5	223.0	118.0
Swiss-French	28.0	34.0	317.1	322.6
Swiss-German	39.0	42.0	437.4	419.0
The Ring en Espanol:	—	—	—	—
Mexico	—	—	—	

Beer

(Continued from Page 4)

share. That could mean the shift of ad dollars from national to local marketing programs."

Hot markets, Mr. Goldman said, will include Boston, which Golden, Colo.-based Adolph Coors Co. entered last year to grab a surprisingly strong share; Detroit, Stroh Brewery's hometown, which Coors will enter this year; Chicago, where LaCrosse, Wis.-based G. Heileman Brewing is struggling to hold its lead against better-funded assaults from St. Louis-based Anheuser-Busch and Milwaukee-based Miller Brewing, and Los Angeles, where Coors is trying to regain its past sale strength.

One such assault, the "Made the American Way" campaign on behalf of Miller High Life, has garnered most attention in the ad world. Analysts say it's helping to slow that brand's decline.

Through selective price increases on premium brands and heavier promotion of lower-price popular and budget brands, the beer battle may be fought on a city-by-city, even store-by-store, basis, analysts say.

Pabst Brewing, Milwaukee, already has begun shipping a new low-price beer, Steinbrau (AA, Jan. 13), that it can promote to prop up its fading Pabst Blue Ribbon brand. In April, Stroh will launch a \$2 million campaign for its Schaefer brand, via MCA Advertising, New York, themed "The one for fun." Heavy attention to low-price brands from A-B, Miller and Heileman is expected.

Stroh officials forecast that the price-beer segment (sold even below popular-price brands) could grow from 14 million bbls. in 1985 to 20 million bbls. by 1990, a 40% increase since 1982. Rollout of Stroh's Schaefer brand was completed in February, 1985, and sales for the year were up 9.5% to more than 4 million bbls.

Of course, the real focus of brewers' marketing plans will continue to be A-B, whose sales and over-all share continued to in-

crease last year. Mr. Goldman estimates 1985 sales for A-B at 67.8 million bbls., up 3.8 million bbls. in an industry that grew barely more than 2 million bbls.

A-B's growth has come at the expense of No. 2 competitor Miller (down an estimated 1.3% to 37 million bbls. in 1985); Stroh (down 2.1% to 23.4 million bbls.); Heileman (down 4.2% to 16.1 million bbls.), and Pabst (down 19.8% to 9.3 million bbls.). Only for A-B competitor Coors does Mr. Goldman estimate a barrelage increase last year (up 11.4% to 14.7 million bbls.), and that is largely because of increased marketing territory.

A-B's flagship Budweiser brand, which alone accounts for better than 25% of total domestic-beer sales, is the only brand in the premium-price category (about 46% of the total market) that didn't receive a major national advertising overhaul in the past 18 months. Agency D'Arcy Masius Benton & Bowles, St. Louis, recently added a new musical score to Bud spots, but the "This Bud's for you" theme and you've-earned-it positioning remain intact.

Miller High Life, the No. 2 premium brand, has gotten a new agency (J. Walter Thompson USA, New York) and a new campaign ("Miller, made the American way"). Heileman has moved responsibility for its Old Style premium brand from Campbell-Mithun, Chicago, to Hal Riney & Partners, San Francisco (and, soon, Chicago), which has created ads touting the brand as "Made with water from when the earth was pure." Coors went the celebrity route, featuring actor Mark Harmon in its 1985 "Coors is the one" campaign (via Foote, Cone & Belding, Chicago), while Stroh has opted for what it openly admits is "mainstream" advertising in its "Stroh's is spoken here" effort (from Marschalk Co., New York).

Analysts generally give those campaigns high marks for effectiveness. Miller High Life, Mr. Goldman said is "declining at a declining rate." He estimates its 1985 shipments at 12.6 million bbls., down 11% from 14.1 million bbls. in 1984, but better than last year's

18% dropoff.

JWT's campaign is "well executed, nicely coattailing the patriotic surge," said John Nelson, analyst at Brown Brothers Harriman, New York. "But High Life's sales decline is still pretty horrendous."

Brewing consultant Robert Weinberg gives the highest marks to FCB's campaign for Coors, which he calls "the best advertising Coors has ever had. They used to have one good ad followed by an awful one. Now it's all good."

One of the first results of S&P Co.'s acquisition of Pabst last year was the firing of national agencies Young & Rubicam, Chicago, and McCann-Erickson, New York. Asher-Gould, Los Angeles, now Pabst's agency, has yet to produce a major multimedia campaign, although some newspaper ads bearing the theme "Pabst is the place" have appeared.

But the development and introduction of those new competitive market positionings is done. Now comes the harder part of seeing some return.

"This year will be a time for brewers to examine every project and brand carefully and for fighting as tough a battle [to increase share] as they can," said Mr. Nelson. "The difficulty will be doing it without playing into Anheuser-Busch's hands."

One of those fronts is price. A-B next month will selectively increase prices on premium-category Budweiser and superpremium Michelob. Bud increases reportedly will be greatest in markets in which the brand's competitive dominance is most unassailable, while no increases are scheduled in most New England markets to better compete with recently introduced Coors.

Rather than discount Budweiser in many markets, A-B instead will give heavier promotion support to Busch (handled by Needham Harper Worldwide, Chicago) and Natural Light (DMB&B, St. Louis), its popular-price entries. Miller similarly can use Meister Brau as a discounted lure to drive High Life.

"Busch used to be the 'heavy' for Anheuser-Busch," said Mr. Goldman. "It was A-B's bodyguard, a

Stroh on import binge

Dorm—Stroh Brewery wants it both ways this year. It's not only looking closely at the low-end of the beer market, but also has its sights set on the top end with two new imports and a Hawaiian pseudo-import ready to go.

The imports are Barbican, a non-alcoholic malt beverage produced by England's Bass Brewery, and Koenig, the top-selling beer in Germany. Primo, a Stroh-owned premium Hawaiian beer, has been re-packaged and will get a statewide test beginning in the Boston area in February. MCA Advertising, New York, handles both Barbican and Koenig, while Primo is handled in-house.

The products are the first introductions since White Mountain Cooler from a marketing hothouse Stroh set up last spring to counter flat sales of U.S.-brewed beers (AA, March 18).

Barbican, which is sold in Europe and the Middle East, will be launched in New York in March with plans for a "rapid national expansion," said John Bissell, Stroh senior vp-special products. Stroh expects its marketing muscle to expand the entire segment, which was only 440,000 bbls. in 1984.

"The potential could be a lot greater than for the low-alcohol segment, which is neither fish nor fowl," Mr. Bissell said. "We're entering with the conviction that the category will take off."

The initial ad campaign, print and spot tv, will use ex-football player Franco Harris as pitchman extolling the taste of the beverage and its imported status.

Koenig will be introduced this spring in an undisclosed pilot market. Mr. Bissell said ad plans haven't been firmed up, but hinted that Koenig's status as the best-selling beer in the world's No. 1 beer country won't be ignored.

"We believe the brand is very marketable, one we can build into one of the top 10 imports," said Mr. Bissell.

Primo has been re-packaged in Hawaii with a green bottle and a label that duplicates the one used for the beer at the turn of the century. Stroh acquired Primo when it took over the Jos. Schlitz Brewing Co. in 1982.

Mr. Bissell said Primo will be positioned "in line with Canadian imports" in its Boston test. Stroh plans a number of promotional efforts such as sponsoring "Hawaiian nights" as well as some spot radio advertising to introduce the beer. —R.S.

brand that kept them above the fray of price competition, and it did its job admirably. Now Busch is more important than ever for A-B, and it still has mileage left in it as a regional tool."

Busch, Stroh's Old Milwaukee and Schaefer brands and Miller's popular-price Meister Brau and price-brand Milwaukee's Best have presented strong challenges to Heileman, long the king of the low-price segment. Heileman has built itself into a national brewing power by using its regional budget brands—Blatz, Schmidt, Weidemann, Red, White & Blue and

others—to use its brewing capacity, keep distributors happy and back its premium Old Style and Special Export brands. Heileman now has a fight on its hands.

"For the first time, Heileman's facing other breweries playing its game, the price game," said Mr. Weinberg. "But [Heileman chairman Russell] Cleary still knows how to play it, and he'll tailor deals for individual markets, too, to keep Heileman's position."

In a no-growth industry, holding on to what they have would represent a good year for most major brewers. #

B&J, K&E merger allows more risk-taking

By STEWART ALTER

Bozell, Jacobs, Kenyon & Eckhardt's resignation of the \$10 million-to-\$12 million Prudential-Bache account in order to compete for \$40 million in Merrill Lynch business (AA, Jan. 9) is the best illustration to date of why Bozell & Jacobs decided to sell to Lorimar and merge with Kenyon & Eckhardt.

In his first interview since the BJK&E merger took effect Jan. 1, Charles Peebler Jr. made it clear he is planning bold moves to make BJK&E the recognized creative and international powerhouse he dreams it can be.

"If an agency or organization is going to make something happen, you're not going to be right all the time," said Mr. Peebler, who is ceo of the \$1.2 billion combined operation. But with more resources, he said, "you can absorb the cost of your mistakes."

This belief applies particularly to international expansion, an area that B&J only recently had begun considering. "If we had been trying

to invest on our own as aggressively as we needed to and if, God forbid, we ran into any economic downturn, it would have put at undue risk all that we had built," he said.

But is K&E's international network, with billings reported at about \$100 million, really all that worthwhile?

"Kenyon & Eckhardt had an undervalued international operation," Mr. Peebler said. "It's much stronger than it was given credit for." The \$100 million figure only represents "our percentage of ownership," he said, noting that the presence of the agencies themselves in their markets is much greater, with total billings of about \$375 million.

B&J's and K&E's networks are now being put together "with additional resources to fill in any gaps that were there," said Mr. Peebler. "We're in the process of doing that in a very aggressive way."

Mr. Peebler has long contended that B&J was underrated creatively and it was, in fact, his efforts to combat that image that ultimately led him to K&E, though Lorimar made the initial overture.

"Probably neither Bozell & Jacobs nor Kenyon & Eckhardt was ever given the credit or the esteem and recognition in this business which we felt was deserved," he said.

B&J was "in the process of looking for a creative director to provide us with increased visibility and stature for a product we felt was underestimated," said Mr. Peebler, adding that his search for a creative spokesperson to provide that visibility often wound up with people saying he was looking for someone like Steve Frankfurt.

Mr. Frankfurt, the creative wunderkind when he served as president of Young & Rubicam/USA in the 1960s, was vice-chairman/chief creative officer at Kenyon & Eckhardt. He retains that post in the merger.

The search for greater visibility and international capabilities was the main reason B&J explored a sale. Mr. Peebler, who was the largest stockholder with a little more than 15% of the agency, had entertained bids from Lorimar and a few other suitors, he said. The Interpublic Group of Cos. reportedly was one of those, with an offer said to be in line with Lorimar's \$40 million.

Mr. Peebler would not comment except to say: "If our objective was to sell out and not worry about the future, we could have made more money, but money was not the motivation."

"The key is we're a people business," he continued, "so we have to ask, 'Is it right? Do they think alike? Do they approach problems

in a similar manner? Do they genuinely appreciate and respect each other's values?" Answering his own questions, he replied, "This really is right. We like the people. They are our kind of people."

One advantage BJK&E had in the merger process was the long incubation period between the announcement in June and the actual amalgamation on Jan. 1. This allowed working out details in advance and let the new agency come up with USAdvertising, its innovative solution to the client-conflict issue. That 40-person, \$30 million agency was spun off from K&E as an autonomous subsidiary of Lorimar with the Ponderosa Steakhouse and Quaker State Motor Oil accounts. Otherwise, there would have been conflicts with B&J's McDonald's Corp. regional franchise account and Valvoline's motor-oil business.

For many employees of BJK&E, especially those at K&E, the long lead time also gave rise to anxieties that proved to be justified. On Jan. 1, the agency let go a little more than 30 professional-staff employees, mostly from K&E—though that might have happened anyway with the unexpected loss of the Seagram business late last year. Additionally, about 50 accounting-department employees, almost entirely from K&E, will be let go by March.

Those 80 persons represent a sizable chunk of staff in New York, where the agency and its other communications companies (public relations, healthcare marketing and direct marketing) employ only about 500 staffers. But no other layoffs were necessary among the ranks of the company's 3,000 employees worldwide, he said. BJK&E additionally has committed itself not to laying off any employees as a result of resigning the Prudential-Bache account.

The decisions on who would get laid off was based on the "overall objectives of clients," said Mr. Peebler. "It has to be totally objective on what's the best quality of work and performance."

Asked whether he would do anything differently in the merger process, Mr. Peebler replied, "I'm satisfied with the decision in concept. I wish that we somehow could have had the time to do all the things and go through all the processes we did faster, in order to cut down on anticipation. I wish we would have been smart enough to have foreseen the Seagram's situation to lessen any of the pain involved in that process. I think that in any major situation, you never talk enough to the people involved and affected. We did everything we could, but you never do enough and it bothers you and leaves you with a sense of frustration." #



C. Peebler

Super Bowl

(Continued from Page 3)
money should be used to purchase high-quality players.

NBC was tired of the AFL losing the Super Bowl. It needed a winner to make its regular-season package more attractive to advertisers.

"The Thursday before the game Namath guaranteed that the Jets would beat the Colts," recalled Charlie Jones, an NBC sportscaster who was involved in the telecasts of Super Bowls I and III. "NBC executives were running around screaming, 'Oh, no, what has Namath done to us.' The AFL, and therefore NBC, was battling for respect. The executives didn't want to be embarrassed. Namath didn't give a bleep, he was playing to win. When the Jets won the game, NBC knew it had something. It was really the turning point for the National Football League and the Super Bowl."

Every year, the events surrounding the Super Bowl escalate. When the Chicago Bears and New England Patriots step on the New Orleans Super Dome on Jan. 26 for Super Bowl XX, the battle between CBS and NBC will move into another phase.

CBS' coverage of the National Football Conference crisscrosses the largest markets in the country. The Dallas Cowboys, San Francisco 49ers, Bears and New York Giants are all recognized as "na-

tional" teams. Executives at NBC, which covers the American Football Conference, consider the Los Angeles Raiders and the Miami Dolphins as their two most attractive teams. If the Patriots defeat the Bears, NBC instantly has another "national" team, which strengthens the package it sells to advertisers.

"Even a good performance, not necessarily a win, will make the Patriots a national team," said Michael Weisman, exec producer, NBC Sports. "Obviously, the most memorable telecasts are the upsets, the unexpected. If New England can pull it off, they will be the team people want to watch."

Lamar Hunt, owner of the Kansas City Chiefs, an AFL founder and one of the members of a joint committee of AFL owners who helped put together the merger of the two leagues, was not concerned about all this network intrigue when the committee was ironing out details. As part of the merger, he, along with Mr. Rozelle and a joint committee of NFL owners, wanted to work out the format for a championship game which would, of course, have to include a name. But they did not think the name of the game would turn out to be a key to its marketing.

The name they decided on was long and mundane: "The AFL-NFL World Championship Game." But another name was literally

bouncing around in Mr. Hunt's mind. He would come home at night and play with his daughter who constantly bounced a "Super Ball" around the house. Super Ball, super ball, yes, Super Bowl!

"The committee was discussing whether we were going to allow one week between the conference championship game and 'the game,'" Mr. Hunt said. "What game?" someone asked. "You know, the last game, the final game, the Super Bowl."

"I looked around the room, checked the faces of my colleagues, saw blank stares," Mr. Hunt continued. "Everybody kind of laughed. The whole thing was spontaneous. Nobody sat down and even tried to think of a name."

The formal name was used for the first two years, but the public and media adopted the name "Super Bowl."

So the newly merged NFL had one key factor in place: A name for the product. The other key was the decision to play the game at a neutral site. This was revolutionary in sports; no championship game had ever been played at turf neither team called home. It also gave advertisers the chance to make plans in advance and allow agencies and companies to throw a week's worth of parties.

The "NFL Party," thrown by the league, is the largest affair. Some 3,000 people gather the Friday night before the game to become part of an unusual theme that changes each year, e.g., the circus.

"I've come to the conclusion that the game has become a phenome-

non because it's a gradual buildup to a winner-take-all matchup," Mr. Rozelle said. "No other sport has the same arrangement. It's like a heavyweight championship was in the old days. The most glamorous event in sports."

This, along with the having-to-be-there syndrome, has led sources to speculate that advertisers today are willing to pay more than \$1 million a minute just to go to the game. "Some people thought I was buying time [two 30-second spots] on the Super Bowl so I could get the [10] tickets and attend the parties," said Mike Wayne, chairman of Birmingham, Mich.-based Durac, a company that makes truck-bed liners and is advertising for the first time on tv during Super Bowl XX. "That wasn't the reason, but I must admit there was some pride and ego involved. The Super Bowl is the ultimate. It's the super advertising experience."

Just as a new company can use the Super Bowl as a springboard, so can an athlete. By winning two Super Bowls and two Super Bowl most-valuable-player awards in four years, San Francisco 49er quarterback Joe Montana parlayed his success on the field into a number of off-the-field endeavors. Following Super Bowl XIX, Pepsi-Cola Co. paid him \$500,000 to appear in a commercial for Diet Pepsi. The figure is the largest ever

paid an athlete for a one-shot commercial deal. Although the 49ers were knocked out of this year's playoffs by the Giants, Mr. Montana will be addressing company gatherings at Super Bowl XX.

"In '81, Joe was a young, emerging star," said Larry Munro, president of Los Angeles-based Charter Athletics, and Mr. Montana's agent. "He makes it to the Super Bowl and all of a sudden here's this smiling kid on the cover of Time magazine. He had his helmet on, but those blue eyes, that face and the fact that he was a Notre Dame graduate told people here's the new All-American boy. Now in 1986, he's a mature gentleman. Madison Avenue has watched him grow up, and the Super Bowl has been his vehicle."

It seems with all the talk of media buys, endorsements, companies, parties and marketing, the event—the game itself—tends to get lost. "It's like Curt Gowdy always used to say," recalled NBC's Mr. Jones. "What about the game? What about the football game?"

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Lauder close, but no Giorgio

By PAT SLOAN

NEW YORK—Although negotiations between Estee Lauder and Giorgio for Lauder's purchase of the \$110 million fragrance company broke off last week, it has become clear that Lauder is no longer content with being a one-star company.

For the last seven months, according to a Giorgio executive, the two companies have been holding preliminary talks, but now "all negotiations are off" (AA, Jan. 13).

At the same time, Lauder CEO Leonard Lauder issued a memo to his staff, which said, according to a Lauder spokesman, "Re: Possible acquisition by Estee Lauder. We aren't."

Mr. Lauder's statement was made just as new reports surfaced that the Lauder family, and not the Lauder company, would actually make the acquisition and run Giorgio as a separate entity.

At Giorgio, the corporate word is that the fragrance division is not for sale. Neither company would discuss what the sticking point to the deal was, though industry sources said it centered on price in relation to projections of Giorgio's long-term growth.

Last June, according to these

sources, a Wall Street investment banking company was brought in by Lauder to appraise the value of Giorgio Parfums and arrived at \$150 million, based on sales in 1984 of \$60 million and a 30% operating profit. But Giorgio president Fred Hayman reportedly held firm at \$185 million based on 1985 growth, which almost doubled sales.

What is believed to have concerned the Lauders, however, is whether that growth can be sustained over the long haul.

Said one source, "The question is, what is the life cycle of fragrance brands today? You have to make a guess on that."

Some retailers, who asked not to be identified, think Giorgio may peak by next year. This is not to say its sales will plummet, but that its rate of growth will not be as smart as in the past. That, and the fact that Giorgio has been essentially a one-product company, may have soured the deal.

Still, the talks prove one thing: The 43-year-old privately held Lauder company, which despite its estimated \$1.25 billion in sales has never made an acquisition before,

now is ready to acquire.

And that is a complete turnaround for Lauder. In 1975, before George Friedman left Lauder to develop the Ralph Lauren fragrances, he first took the Lauren concept to the Lauders. They said no and Mr. Friedman later started Warner Cosmetics under Warner Communications. That was sold to Cosmair for \$146 million.

When Mr. Friedman was turned down by the Lauders, it was said that Estee Lauder, Mr. Lauder's mother and the company's founder, did not want to sell anything that either didn't carry her name or wasn't thought up by either herself or a member of the family.

But a year ago, Lauder negotiated with the San Francisco-based sportswear marketer, Esprit Corp., to license that name for a fragrance. Those talks also broke off. However, the Giorgio affair shows the company has continued searching outside for a new brand while continuing to develop its own internally.

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Thursday

Motown media man

Philip Guarascio, long known as a brilliant media theoretician, holds a coveted corner office in the General Motors building, a privilege usually reserved for people who have made auto

mobiles and GM their lives. Guarascio is an outsider. He was recruited from the agency business to become executive director for advertising services on the auto maker's marketing and product-planning staff. He oversees GM's \$1 billion a year advertising and promotional budget from a position that didn't exist before he filled it. For Guarascio, the lure of the GM job was a chance at making history. See Page 3.

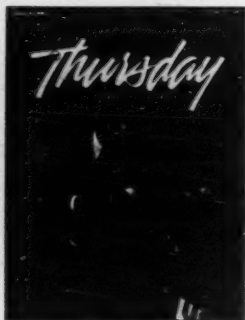


Photo by Mary Herlehy

Workin'

Joey Cummings' current "Work" is the creative directorship of Tracy-Locke, the \$240 million, Dallas-based powerhouse ad agency. How it differs from previous "Work" at agencies she's been at earlier is in offering her a seat on the board as well as complete creative control of the agency's 80-person creative department and its 30 or so accounts. A juicy career package for which many creatives would happily sell their Clio's. See Page 52.

Presstime

Nynex keeps Y&R

NEW YORK—Nynex Corp. has retained incumbent Young & Rubicam to handle the regional telephone company's \$10 million-to-\$15 million corporate account (AA, Nov. 11, et seq.). Other finalists were BBDO and Chiat/Day here and Hill, Holliday, Connors, Cosmopolis, Boston.

Alberto nods to Grey

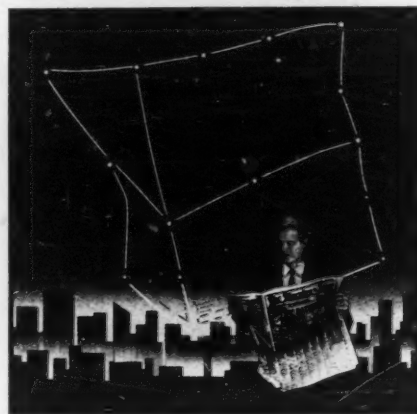
MELROSE PARK, ILL.—Alberto-Culver Co. has moved its estimated \$10 million toiletries account to Grey Advertising from Bozell, Jacobs, Kenyon & Eckhardt, both Chicago. The company last week confirmed it was talking to other agencies, but an A-C spokesman said the company had no immediate plans for such a move (AA, Jan. 16).

'War' from N.Y. Air

NEW YORK—New York Air will launch a "Shuttle wars" campaign against Eastern Air Lines' service from here to Boston and Washington with two Super Bowl TV commercials that will air in the three markets at a cost of close to \$1 million. The effort promotes services, including snacks and reserved seats. Levine, Huntley, Schmidt & Beaver handles.

VW pulls into Super Bowl

TROY, MICH.—Volkswagen of America will introduce a new wrinkle in automotive sales incen-



Special Report—Newspapers

Newspapers have discovered the power of modern marketing. Terms like niche, product development, target audience and skew now are part of the vocabulary of editors, publishers and ad executives. Reader research, price, editorial content, advertising and special promotions all come into play as newspapers seek to attract readers and advertisers. Special Report examines some of these marketing tactics, starting on Page 13.

tives in 15-second spots during this weekend's Super Bowl telecast on NBC-TV. Volkswagen will offer a refund of the first year's interest on private loans for its GTI model. VW will run two different spots in the pregame show, one mentioning the Chicago Bears and the other the New England Patriots. For the postgame show, the German car maker has shot two spots but will air only one. One version of the postgame commercial names the Bears as the Super Bowl victor and the other names the Patriots. Doyle Dane Bernbach handles.

Miss St. Pat's sought

STAMFORD, CONN.—Guinness Import Co. is running a national promotion to elect Miss Guinness Stout or Miss Harp Lager as "Miss St. Patrick's Day 1986." Guinness will run page ads of the beauty queens in *USA Today* in March, asking consumers to call in their choice on a 900 number. The Marketing Center, Westport, Conn., handles.

Miller sweeps onto court

MILWAUKEE—Miller Brewing Co. next month will conduct a "Win the finals" sweepstakes for its High Life brand, tied to the NCAA basketball tournament in March. Print ads in February issues of *Basketball Times*, *Sports Illustrated*, *USA Today* and college newspapers support. J. Walter Thompson USA, New York, handles.

Kodak products develop

NEW YORK—Eastman Kodak Co., Rochester, N.Y., has introduced two fully automatic, non-single-lens-reflex 35mm cameras that will be available at retail Jan. 27. Advertising, via Kodak (Continued on Page 55)

Street Talk

For 1985, newspapers expect national ad revenue to come in 9.5% over 1984. Have newspapers turned the corner in attracting national ads, and will national newspaper spending continue to grow at the same rate this year?

Jack Cohen, vp-print and outdoor media buying, Doyle Dane Bernbach, New York: "Newspapers have taken some positive steps to attract national advertisers, vis-a-vis the SAUs and a vast improvement in the quality of color reproduction. On the other side of the coin, however, they still have a pricing problem; the differential between the national and the retail rates seems to be widening rather than narrowing. I think expenditures in 1986 will be pretty much as they were in 1985."



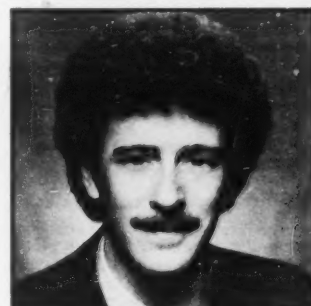
J. COHEN



L. SCHULTZ

Louis M. Schultz, exec vp-director of media services, Campbell-Ewald, Warren, Mich.: With increased emphasis on local marketing by many national advertisers, newspapers have a wonderful opportunity to improve revenues. However, until newspapers come to grips with the age-old, two-tier pricing controversy and make significant progress in reducing the general vs. retail rate differential, along with an improvement in national ad positioning, they won't enjoy a significant increase in 1986 or the short-term future.

Leo E. Scullin, senior vp-director of print and new electronic media communications services, Young & Rubicam, New York: "They have not turned the corner. One must isolate the rate increases from this figure. Rates have risen in the 7%, plus or minus 0.5, range and there has only been 1% to 2% of real growth. It's not a trend, it's a blip. In my estimation, no significant increase in national advertising will occur until there is an elimination of the rate differential."



L. SCULLIN



W. HADLOCK

Willard Hadlock, exec vp-director of media services, Leo Burnett USA, Chicago: I don't know what's going to happen [this] year. I think that as long as newspapers have local rate differential...they'll continue to have a problem. The newspaper industry as a whole has got to come up with a rate program that says 'we care as much about the national advertiser as we do about local advertisers.' Until they do that, they're sending a message to national advertisers that they're second-class citizens.

Frank Hajek, associate media director-director, print media relations, Dancer Fitzgerald Sample, New York: "There has probably been very little change. From the agency point of view, there are two things that will require the most attention and are probable causes for them not making national advertisers' media schedules or being knocked off. They are pricing, either heavy out-of-pocket costs, rate differentials or premiums, and the fact that newspapers are the only visual medium that doesn't have good, consistent color."



F. HAJEK

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ADVERTISING AGE *Thursday* asks those who serve agency creative and/or media departments to share views on major advertising-related issues. While we're out there making calls for this feature, why wait for the phone to ring? Send pithy comments and a recent photo to: Street Talk, ADVERTISING AGE *Thursday*, 220 E. 42nd St., New York 10017.

Special Report

Newspapers



Jeffrey Tuth

Marketing is the industry's rising star

By William Gloede

It was scarcely a decade ago that a typical newspaper executive was more likely to equate the word marketing with a trip to a grocery store than with the science of moving manufactured goods into the hands of consumers.

Now, editors, publishers and ad executives are using terms like niche, product development, target audience—even skew—when they talk about their business. Newspapers have discovered the power of modern marketing.

In the past 15 years, the newspaper business gradually has said “yes” to marketing, and some newspaper executives have begun embracing its tenets almost as fervently as they do those of the U.S. Constitution.

“The newspaper business was a labor-intensive industry with hefty production parameters that

produced a traditional and relatively unchanged medium,” says Charles Kinsolving, vp-new technology for the Newspaper Advertising Bureau, New York. “Formats hadn’t changed since Benjamin Franklin’s time.”

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Although there were some newspapers that paid heed to marketing before the early to mid-1970s, most were run by editors and publishers who believed that the relationship between the newspaper and its readers, based on the First Amendment, made the newspaper itself special.

“There was a historical resistance to think of newspapers as just another package good, just another commodity,” says John Mennenga, vp-research and marketing for Sawyer-Ferguson-Walker Co., a New York-based company that represents newspapers to advertisers.

That resistance began to break down as news-
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Unless otherwise noted, all daily newspaper circulation figures used in this Special Report are those reported to Audit Bureau of Circulations for the six months ended Sept. 30, the most recent statistics available.

Putting muscle behind media mix

By Janet Simons

You see that sleepy guy in his pajamas, the one trying to keep snow out of his slippers as he hops to the curb to pick up his morning paper? The newspaper reader, publishers used to assume, would always be there, cursing his paper carrier and clutching his bathrobe against the wind.

They don't take him for granted anymore. Publishers are aiming millions of dollars of advertising at him in an effort to assure that he, and new readers just like him, will hop across America's lawns every morning for decades to come.

Advertising to attract readers is nothing new. Newspapers always have plugged holes with in-paper ads designed to persuade newsstand patrons to subscribe. What's new is a growing realization that newspapers need to promote themselves to survive, a realization fueled by newspaper failures and bleak statistics indicating that the readership base is continuing to erode, according to the American Newspaper Publishers Assn., Reston, Va.

For example, to promote its *Chicago Tribune*, the Tribune Co. spends between \$3 million and \$4 million a year on media that include tv, radio and outdoor, says Richard Honack, manager of promotions and special events.

"It's necessary just to keep us in the market," Mr. Honack says. The paper faces competition from New York-based News America Publishing's *Chicago Sun-Times*, another heavy user of tv and radio advertising. *Tribune* radio spots push single-copy sales, and tv ads focus on image, presenting the paper as Chicago's market leader.

"For such a long time, everyone preached the use of in-paper ads," Mr. Honack says. "But that's like restricting toothpaste advertising to messages on the backs of the tubes. The only customers who see them have already bought your

Janet Simons is ADVERTISING AGE's Denver correspondent.

product."

However, marketing of toothpaste and newspapers is more comparable than it once was. As newspaper promotion departments have expanded to become marketing departments, various papers have recruited veterans of the package-goods industry to guide their efforts. These veterans bring a firm belief in the value of radio and tv advertising.

Pierce DeGross, former vp-hair products for L'Oreal, New York, is director-marketing for the *Washington Post*. He compares the *Post*'s current campaign, "We are everything that's Washington,"

tv campaigns were limited to short-term subscription pitches.

While the *Post* attempts to strengthen its king-of-the-hill position in the market, other metropolitan dailies struggle for readers amidst strong competition.

For example, in Denver the *Rocky Mountain News*, owned by the Cincinnati-based Scripps Howard chain, began using tv after its competition, the *Denver Post*, was purchased by promotion-minded Times Mirror Co., Los Angeles, in 1981. Even considering that the Scripps Howard newspaper properties are considerably smaller than Times Mir-

perception by default," says Vern Malinen, *Rocky Mountain News* promotion director.

In addition to building image, circulation and ad revenues, newspapers have learned to look to advertising as a short-term problem-solving strategy. The *Seattle Times* tv and radio advertising budget nearly doubled after May, 1982, when the *Times* and the *Seattle Post-Intelligencer* signed a joint operating agreement, says James Mace, marketing services manager for the *Times*, which handles business functions for both papers.

"It has taken us more than two years to get the public to understand the new arrangement, and we advertised heavily, particularly on the radio, to explain it," Mr. Mace says.

Similarly, at the beginning of a strike against the *Chicago Tribune*, the paper saturated the radio airwaves for six weeks to assure readers that the paper would continue to publish.

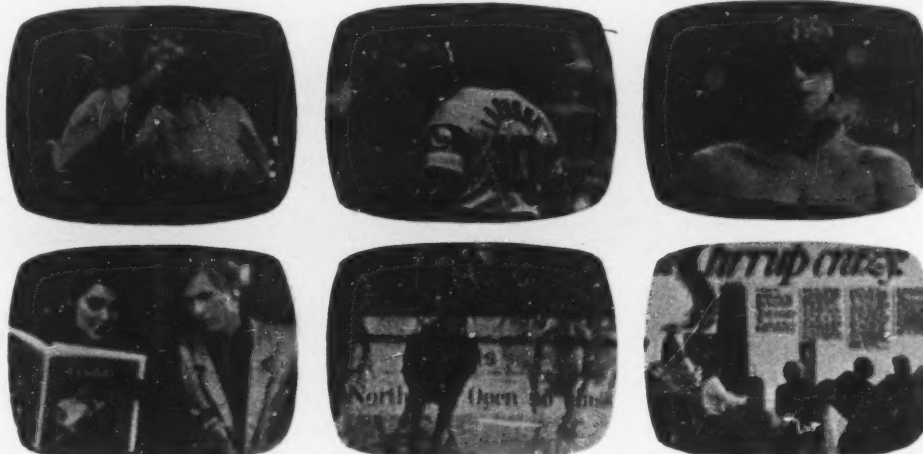
Radio often is the medium of choice for such campaigns because of its penetration ability, lower production costs and quick turnaround time, industry observers say.

Over-all, newspapers are rapidly expanding their use of radio advertising, according to the Radio Advertising Bureau, New York. Reports from member stations on cash transactions, excluding trade-outs, show newspapers spent \$3.7 million on radio

advertising in the first nine months of 1985, compared with \$2.1 million in the first nine months of 1984—an increase of 75%. The increase is attributable to the medium's strength as a targeting tool, says Daniel Flamborg, senior vp-communications for the RAB.

"For a long time, the print media saw radio only as a means to give a quick rabbit punch to street sales," Mr. Flamborg says. "Now it's being used much more broadly, for example, to support image campaigns."

However, radio is not the only medium previously misunderstood by the newspaper industry. Although tv has become an integral part of a newspaper's media mix, (Continued on Page 16)



The *Chicago Tribune* focuses on the image of a "great newspaper" in its tv spots, part of its \$3 million to \$4 million media campaign.

to the image advertising previously used by L'Oreal. Created by Needham Harper Worldwide, New York, it features evocative scenes of Washingtonians reading the *Post* as part of their daily routine, backed by an anthem sung by country singer Lee Greenwood. Introduced in May, the effort is the paper's first year-round, image-based campaign. Previous

ror's, the contrast between the two chains' tv advertising expenditures is striking. The Scripps Howard chain spent only \$224,000 nationally on spot tv advertising in 1984; Times Mirror spent nearly \$3 million, according to the Television Bureau of Advertising, New York.

"The *Post* began using television, and we didn't want them to win the battle of

Newspapers are looking to advertising as a short-term problem-solving strategy also.

Marketing is the rising star

(Continued from Page 13)

papers began seeing the decline of circulation and circulation penetration, the number of newspapers sold in a particular market relative to the population of that market. With that decline came stronger competition for local ad dollars, first from broadcast media, then from weekly newspapers and shoppers and finally from direct mailers.

Through the Newspaper Advertising Bureau and the American Newspaper Publishers Assn., Reston, Va., the industry funded and participated in a six-year study of newspaper readership called the Newspaper Readership Project. It is that effort, begun in June, 1977, and concluded in May, 1983, that ushered in the era of newspaper marketing, industry executives say.

The project sought to find the reasons readers were abandoning newspapers. It looked at who readers were, why they read and what they read. Similarly, it studied nonreaders and their reasons for shunning newspapers. The effort, a first, smacked of market research, and it was

backed by some of the biggest publishers in the business.

"It really helped break down the wall between editorial and advertising," says James Dunaway, vp-information for the Newspaper Advertising Bureau. Editors, heretofore zealously protective of the news product, began to understand that what they believed readers wanted was not necessarily what readers wanted.

At the same time the industry embarked on the readership project, the *New York Times* developed what at the time was a new concept in newspapering. It began special sections keyed to the day of the week with the roster eventually filling out to Sports on Monday, Science on Tuesday, Living on Wednesday, Home on Thursday, and Weekend on Friday.

The *Times* was followed throughout the industry as newspapers realized that separate segments of their readership had definite interests and a one-day-a-week section could address these interests while providing a specific editorial environment for advertising messages.

About midway through the readership

project, individual newspapers began cooperating with one another in ventures thought to be of value to the industry. The most visible of these efforts was the Standard Advertising Unit system, a series of standard ad sizes conceived to alleviate advertiser and agency problems with ad production. A preliminary system was adopted in 1982, with a modified system adopted in 1984.

Another result of the new spirit of cooperation was the syndicated research study of newspaper audiences. Conceived in response to advertiser and agency calls for standardized, comparable research across the nation's top markets, the industry has funded and participated in four such studies since 1980, the most recent being the Simmons-Scarborough study released last summer.

Also during the readership project, newspapers went on a capital-spending binge centered in the marketing functions of packaging and distribution. New press equipment brought color to the pages of scores of newspapers and new computerized conveying, inserting, bundling and sorting equipment began

converting the typical newspaper mailroom—a nightmare of labor intensity and inefficiency—into a modern materials handling and distribution facility.

Although there are no industrywide figures on advertising and promotion, it is generally believed in the newspaper business that both are up substantially since the dark days of the early '70s. In the first nine months of 1985, newspapers spent 75% more on radio advertising than during the same period in 1984, according to Radio Advertising Bureau, New York. Radio expenditures by local papers have increased from \$2.1 million to \$3.7 million over that period, the RAB reports. Even papers in so-called noncompetitive markets are running tv and radio campaigns.

Although the results of newspapers' new marketing prowess are difficult to quantify, over-all circulation has been moving upward through the 1980s. Also, newspapers will remain the nation's No. 1 advertising medium in 1986, showing a gain in the 8% range over 1985's \$25.5 billion in advertising investments, according to Robert Coen, senior vp-director of forecasting at McCann-Erickson, New York.